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## **REQUEST FOR PROPOSALS**

### **ENHANCED ENROLLMENT PROGRAM: CALIFORNIA ALTERNATE RATES for ENERGY (CARE) AND FAMILY ELECTRIC RATE ASSISTANCE (FERA)**

Interested bidders should submit proposals to:

DESERT COMMUNITY ENERGY  
ATTN: BENJAMIN DRUYON  
73-710 FRED WARING DRIVE, SUITE 200  
PALM DESERT, CA 92260

**Proposals must be received by DCE by 3:00 pm (local time) August 23, 2019  
Late proposals will not be accepted.**

Technical questions regarding this Request for Proposals should be directed to Benjamin Druyon, (760) 346-1127, [bdruyon@cvag.org](mailto:bdruyon@cvag.org).

## REQUEST FOR PROPOSALS

### ENHANCED ENROLLMENT PROGRAM: CALIFORNIA ALTERNATE RATES for ENERGY (CARE) AND FAMILY ELECTRIC RATE ASSISTANCE (FERA)

#### DESERT COMMUNITY ENERGY

#### 1.0. INVITATION

Desert Community Energy (DCE) is seeking proposals from qualified organizations to assist with increasing enrollment of eligible low-income electricity customers in the CALIFORNIA ALTERNATE RATES for ENERGY (CARE) and FAMILY ELECTRIC RATE ASSISTANCE (FERA) programs in the cities of Palm Springs, Palm Desert, and Cathedral City. This enhanced enrollment program would be implemented on behalf of these Desert Community Energy member agencies served by Southern California Edison (SCE) in the Coachella Valley.

This RFP includes a scope of work for implementation and outreach tasks necessary to achieve the goals of this enhanced enrollment program. It also includes an option for a performance incentive based on meeting annual performance goals.

Please submit your organization's proposal by email no later than 3 pm on Friday, August 23, 2019. Proposals should be submitted to the attention of Benjamin Druyon, [bdruyon@cvag.org](mailto:bdruyon@cvag.org). You will receive a return email confirming receipt so please allow adequate time for your email submittal to be received and confirmed.

Desert Community Energy reserves the right to reject all proposals or to split or award the contract in any manner determined to be the most advantageous to DCE. As a result of the RFP process, DCE may select one or more consultants to complete the various tasks described in the scope of work.

Desert Community Energy would like to have a local organization take the lead on development, implementation and outreach for this enhanced enrollment program. This organization would work in collaboration with Southern California Edison and SoCal Gas representatives as well as other local firms, organizations, and entities with common interests in enhancing participation in low-income programs. The roles of the consultant are further identified in Part III – Scope of Work. Cooperation and coordination among the various participants will be required to provide a cohesive program.

#### I. BACKGROUND AND GENERAL DESCRIPTION

Desert Community Energy (DCE) is a Joint Powers Authority (JPA) formed by Cathedral City, Palm Desert, and Palm Springs to offer a Community Choice Aggregation (CCA) program. Community Choice Aggregation (CCA) allows cities and counties to pool or aggregate their buying power to purchase electricity on a region-wide basis, to offer competitive rates to their consumers with the option of purchasing power from greener sources. Desert Community Energy is scheduled to start serving customers ("launch") in Palm Springs in 2020, with other cities likely to launch in 2021. DCE contracts with Coachella Valley Association of Governments (CVAG) for administrative services and staff.

A Community Choice Aggregation program is consistent with ongoing regional efforts to promote cleaner, greener energy at competitive rates; energy efficiency and renewable energy; climate action goals; and regional collaboration. Through DCE, local governments and their constituents can achieve a powerful range of objectives:

- Enhance local control of electricity rate structure, and sources of power;
- Provide electric power and other forms of energy to customers at a competitive cost;
- Reduce greenhouse gas emissions related to the use of power and provide an electricity supply with a lower carbon footprint;
- Carry out programs to reduce energy consumption and increase the use of renewable energy;
- Stimulate and sustain the local economy by developing local jobs in renewable and conventional energy; and
- Promote long-term electric rate stability, energy security and reliability for residents through local control of electric generation resources.

As Desert Community Energy considers launch dates for its member agencies – beginning in 2020 – we are exploring ways to maximize the benefits to the community. Through the California Alternative Rates for Energy (CARE) and Family Electric Rate Assistance (FERA) programs, there is potential for as much as 30 percent savings for low-income customers who are not currently enrolled. According to data from SCE’s annual reports from 2013 to 2018, the average participation rate for CARE low-income assistance programs in Edison’s service territory is 88%. Using data from SCE annual reports and census data, DCE staff conducted an analysis and has determined:

- There are 18,000+ customers currently signed up for CARE in the three DCE cities. Desert Community Energy staff estimates over 6,000 customers are eligible for CARE and FERA enrollment, but not currently signed up.
- If even 25% of those potential new CARE and FERA customers were enrolled, the collective benefit would be nearly \$900,000 in annual savings on their utility bills. This could amount to an average savings of \$864 per eligible customer.

**Table 1. Estimate of eligible customers not enrolled in CARE or FERA for each DCE City and economic benefit for various levels of enrollment.**

City	Total CARE Accts	Max New CARE Electric	Max New CARE Gas	Max New FERA Electric	Annual Combined Incremental Benefit if Enroll Given % of New CARE and FERA Customers			
					25%	50%	75%	100%
Cathedral City	7145	1163	582	1353	\$341,370	\$682,741	\$1,024,111	\$1,365,482
Palm Springs	4943	805	402	936	\$236,164	\$472,329	\$708,493	\$944,657
Palm Desert	6173	1005	502	1169	\$294,931	\$589,861	\$884,792	\$1,179,723
<b>Total</b>	<b>18261</b>	<b>2973</b>	<b>1486</b>	<b>3458</b>	<b>\$872,465</b>	<b>\$1,744,931</b>	<b>\$2,617,396</b>	<b>\$3,489,861</b>

*Estimated Annual Billing Savings/Year/CARE Electric Account:* \$744 (Average CARE account pre credit electric bill of \$147/mo based on 977 kWh/month x \$0.21/kWh x 30% credit = \$62/month credit, or **\$744/year**)

*Estimated Annual Billing Savings/Year/CARE Gas Account:* \$120 (Average gas bill of \$50/month based on consuming 35 therms; CARE credit of 20% or \$10/month, or **\$120/year**)

*Estimated Annual Billing Savings/Year/FERA Electric Account:* \$318 (Average FERA account pre credit electric bill of \$147/mo based on 977 kWh/month x \$0.21/kWh x 18% credit = \$36.93/month credit, or **\$443/year**)

In April 2016, the Coachella Valley Association of Governments (CVAG) Executive Committee provided direction to explore a Community Choice Aggregation program through completion of a feasibility study. In the summer of 2017, Desert Community Energy was formed as a Joint Powers Authority; the three member cities joined by vote of their respective city councils. In December 2017, Desert Community Energy submitted an Implementation Plan to the California Public Utilities Commission (CPUC), a requirement for a new CCA. The Implementation Plan is available on the DCE website at:

[https://desertcommunityenergy.org/wp-content/uploads/2018/05/DCE\\_Implementation-Plan.pdf](https://desertcommunityenergy.org/wp-content/uploads/2018/05/DCE_Implementation-Plan.pdf).

For more background on Community Choice Aggregation, please see <http://www.leanenergyus.org/>.

DCE has also formed a Community Advisory Committee (CAC) at the direction of the Board. The CAC will meet on a regular basis to assist and provide input to the Board. The CAC consists of 15 members, 5 from each of DCE’s member cities, who will act as liaisons of their respective communities. One of the first assignments of the CAC will be to assist DCE staff and the selected consultant with the process of implementing a CARE & FERA enhanced enrollment program and seeing it through to success. The CAC is available to assist with outreach to low-income customers to educate and inform them about this program and the benefits it can offer.

## II. PURPOSE

The purpose of the program is to increase enrollment of eligible low-income customers in programs to help them save money on their electric bills. California Alternate Rates for Energy (CARE) and Family Electric Rate Assistance (FERA) are two low-income assistance programs that Southern California Edison offers. SoCal Gas offers a CARE program and coordinates efforts to enroll customers with SCE. CARE customers receive a savings reduction of up to 30% of their energy bill, while FERA customers can save up to 18%. To qualify for CARE or FERA, customers need to meet criteria based on their household income or have someone in their household who already participates in a public assistance program, such as CalWorks or Medi-Cal. For more background on the CARE & FERA programs, please see <https://www.sce.com/residential/assistance/care-fera>.

In a recent data request from SCE, it was reported that participation rates for Cathedral City, Palm Desert and Palm Springs are well below 88% (see Table 2). One way investor owned utilities such as SCE increase participation rates, is to enlist capitation contractors to seek out and enroll new customers into their respective low-income programs and pay them a fee for each application they secure. In the annual report, SCE lists only two capitation contractors in the Coachella Valley area, Desert Arc and Senior Advocates of the Desert. These agencies display applications at their place of business but do not actively pursue new customers.

**Table 2. CARE & FERA participation rates per zip code for DCE cities**

TABLE 2		
Zipcode/City	Participation Rate	
	CARE	FERA
92234 - Cathedral City	76.9%	9.3%
92260 - Palm Desert	58.4%	6.4%
92211 - Palm Desert	41.6%	7.8%
92262 - Palm Springs	57.5%	3.9%
92264 - Palm Springs	47.9%	7.5%
*CARE/FERA data is as of February 2019		
*Estimated eligible is based on 2018 Athens Research data		

**Goal:**

To increase enrollment participation rates in the CARE and FERA low-income programs in Cathedral City, Palm Desert, and Palm Springs over a 2-year period, with progress to be evaluated based on the annual goals listed in Table 3.

**Table 3. Annual goal for increased CARE/FERA enrollment of eligible customers**

		CARE	FERA
	estimated eligible	2973	3458
yr.1	10%	297	346
yr.2	15%	446	519
2 yr. total	25%	743	865

**III. SCOPE OF WORK**

Through this Request for Proposals (RFP), DCE is seeking a marketing and community outreach partner to assist with development and implementation of a CARE & FERA enhanced enrollment program in the cities of Palm Springs, Cathedral City, and Palm Desert. Proposals submitted should identify your organization’s proposed strategy, recommendations, and budget to implement a comprehensive program to increase enrollment of eligible customers in CARE & FERA. The proposal should address the following tasks.

- **TASK ONE: Outreach Plan**  
Design and Implement an outreach plan specific to CARE/FERA eligible enrollees in Palm Springs, Cathedral City, and Palm Desert.
  - Plan for Outreach should:
    - Identify key agencies, charitable organizations, faith-based organizations, community-based organizations, and other stakeholders to engage to accomplish the Goal.
    - Describe ideas for best use of outreach tools, social media, events, and other forms of outreach to encourage participation
    - Identify how proposed outreach will enhance DCE brand recognition.
    - Outline strategy for coordination with Southern California Edison and Southern California Gas Company, leveraging their utility resources and communication with customers
    - Describe opportunities for outreach through DCE member agencies (Palm Springs, Cathedral City, and Palm Desert)
    - Identify how DCE’s Community Advisory Committee can assist with CARE/FERA outreach
    - Describe recommendations for other ways to reach and enroll additional eligible customers
    - Provide all program materials in English and Spanish and address the needs of non-English speaking customers

- **TASK TWO: Coordinate Application Process**

DCE is in the process of applying to become a capitation contractor.

- If DCE becomes a capitation contractor, consultant will gather all DCE applications and submit to SCE on a weekly basis.
- If DCE cannot become a capitation contractor, consultant will actively seek to enroll new capitation contractors and notify any new capitation contractors of their responsibility to submit applications to SCE. Consultant will check in with new capitation contractors on a weekly basis to ensure applications are being submitted.

- **TASK THREE: Tracking and Reporting Progress**

Develop strategy/timeline to reach 1-year goal, 2-year goal

- Plan to reach 10% first year (based on Table 2)
  - Develop timeline for year one
  - Coordinate with SCE to track progress on submitted applications
- Plan to reach 15% second year
  - Develop timeline for year two
  - Provide tracking spreadsheet with progress toward goal
- Strategy for beyond 2<sup>nd</sup> year
  - Evaluate effectiveness of outreach program in first 2 years
- Prepare monthly reports for DCE's Community Advisory Committee and DCE Board on progress toward goal
- Two months prior to end of year 1, assess progress toward goal and revise outreach plans as needed
- Submit final report on Program successes, outcomes, suggestions for the future
  - Describe in detail any methods that were successful in increasing number of enrollees
  - Describe in detail any methods that weren't successful in increasing number of enrollees and methods that should be avoided
  - Describe how the successful methods used can be replicated on a larger scale
  - Offer suggestions for making outreach strategies sustainable for ongoing enrollment

#### IV. SCHEDULE

Item	Date
1. Release of Request for Proposals	Friday, July 19, 2019
2. Submittal of Questions	On or before Friday, August 9, 2019 (Responses to questions will be posted on DCE website by 5 pm on August 16, 2019)
3. Deadline for Receipt of Proposals	<b>Friday, August 23, 2019</b> (3:00 pm)
4. Potential Interviews (tentative)	Between August 27-30, 2019
5. Expected contract award	September 2019

Location:  
Coachella Valley Association of Governments  
73-710 Fred Waring Dr., Suite 200  
Palm Desert, CA 92260

DCE anticipates awarding a two-year contract which may be extended at the sole discretion of DCE.

## **V. PROPOSAL REQUIREMENTS**

The requirements of this section are mandatory and failure to comply completely will deem the proposal non-responsive. Proposals must contain the following sections:

- A. Introduction/Executive Summary
  - 1. Describe your organization and why you are suited to provide the marketing and outreach services for this CARE & FERA enhanced enrollment program. Provide brief qualifications summary and identify team members.
  
- B. Qualifications
  - 1. Describe qualifications, experience and expertise of principal team members.
  - 2. Describe up to three projects your organization has completed in the past five years related to CARE & FERA, low-income programs, or experience that demonstrates your organization's ability to implement programs with similar goals and focus.
  
- C. Organization Profile. This section of the Proposal is designed to establish the bidder as an entity with the skills and experience necessary to complete the tasks outlined in the RFP. The Organization Profile should be concise and clear and include descriptive information regarding skills and experience relevant to this program. The following information must be provided:
  - 1. Organization name.
  - 2. A brief history of the organization, including the number of years in operation under the present organization name, as well as prior names and number of years' experience providing the proposed, equivalent, or related services.
  - 3. Organizational chart, including staffing structure.
  - 4. Organization size – total number of personnel and proposed number of personnel that could be available to provide services.
  - 5. Describe the organization's experience in performing work of a similar nature to that solicited in this RFP, and the participation in such work by the key personnel proposed for assignment to this Program. Highlight the organization's and key personnel's experience relevant to formation and implementation of a low-income assistance or enhanced enrollment program.
  - 6. Describe experience in working with the various agencies that may be stakeholders that could help DCE achieve the goals and complete the tasks specified in this RFP. Please include specialized experience and professional competence in areas directly related to this RFP.
  - 7. Explanation of capability and commitment to cooperate with other consultants and organizations in a collaborative setting; please cite specific examples.
  - 8. Existing agreements with other agencies to provide similar services.
  - 9. References - names, current phone numbers for existing and past clients.

10. A listing of proposed project personnel, including personal experiences and individual resumes for prime personnel. If subconsultants are to be used, identify the responsibility and qualifications of each.
- D. The submittal will be concise, well organized and clearly demonstrate the skills and experience of the consultant team. The submittal will not exceed 10 pages (size 8 ½" x 11") including the organizational chart and appendices, excluding the cover letter. You may refer us to your website for organization history, resumes, and other background information.
- E. Please submit the proposal by email in Adobe Printable Document Format (pdf), identified in the subject line as "DCE CARE/FERA Enhancement Program RFP" to Benjamin Druyon at [bdruyon@cvaq.org](mailto:bdruyon@cvaq.org) . The total size of the submitted file(s) must not exceed 5 MB due to server limitations.
- F. The proposal will include the name of the consultant submitting proposal, mailing address, telephone number, email address, and the name of the individual to contact if further information is desired.
- G. The prospective consultant will designate the project manager by name. The selected consultant will not substitute the project manager or other members of the project team without prior approval of DCE.
- H. The Consultant shall obtain city business license(s) if required.
- I. All proposals must be received by email in DCE offices by 3:00 pm Friday, August 23, 2019. Late proposals will not be accepted. Proposals must be submitted to:

Desert Community Energy  
Attn: Benjamin Druyon  
[bdruyon@cvaq.org](mailto:bdruyon@cvaq.org)

- J. Each Proposal must include the following items:

Technical Proposal:

1. Describe the approach and work plan for completing the tasks specified in the Scope of Work. The work plan shall be of such detail to demonstrate ability to accomplish the project objectives and overall schedule.
2. Outline sequentially the activities that would be undertaken in completing the tasks and specify who in the organization would perform them.
3. Furnish a Project schedule for each task and subtask in terms of elapsed weeks from commencement dates.
4. Identify methods that will be used to ensure quality control as well as budget and schedule control for the Project.
5. Identify any special issues or problems that are likely to be encountered during this Project and how will they be addressed.
6. Proposers are encouraged to propose creative enhancements or innovations to the Scope of Services that do not materially deviate from the objectives or required content of the Project.

Cost Proposal:

Proposers shall provide a detailed cost proposal, identified as Exhibit B, which should include a description of consultant costs by task, including but not limited to job titles, estimated hours

per person, hourly rates, travel time/costs, and other expenses related to these tasks. As part of the Cost Proposal, consultants may propose an option for a performance incentive based on enrollment success.

- K. All proposals submitted in response to this RFP will remain valid until December 31, 2019.

Any questions, technical or otherwise, pertaining to this request for RFP **must be submitted via email by Friday, August 9, 2019 and directed to:**

Benjamin Druyon  
Management Analyst for Environmental Resources  
Desert Community Energy/Coachella Valley Association of Governments  
73-710 Fred Waring Drive, Suite 200  
Palm Desert, CA 92260  
Ph. (760) 346-1127  
Email: [bdruyon@cvaq.org](mailto:bdruyon@cvaq.org)

Responses to such questions will be posted at [www.desertcommunityenergy.org](http://www.desertcommunityenergy.org) by August 16, 2019.

## VI. RESPONSIBILITY OF CONSULTANT

If it is found that a consultant is not responsible (i.e., has not paid taxes, is not a legal entity, submitted a proposal without an authorized signature, falsified any information in the proposal package, etc.), the proposal will be rejected.

## VII. CONSULTANT SELECTION

- A. Each proposal will be reviewed by an evaluation group to determine if it meets the proposal requirements. Failure to meet the requirements of the Request for Proposals may be cause for rejection of the proposal.
- B. The evaluation group may ask for formal oral presentations by the selected consultants. The number one ranked consultant(s) will then proceed to fee negotiation.
- C. The prospective consultant is advised that should this Request for Proposals result in award of a contract, the contract will not be in force until it is approved and fully executed by the DCE Board.
- D. The selected consultant(s) will work closely with DCE staff through the duration of the project. The following non-exclusive list of factors may be considered in the selection of consultant(s) for final negotiation of a contract:
  1. *Project understanding*: Degree of understanding of the project and familiarity with the area.
  2. *Scope of Work*: Proposed approach to the project including the expected time commitment of key personnel and technical approach to the project.
  3. *Project Managers/Staff Qualifications*: Qualifications of the staff assigned to manage and conduct the project.
  4. *Demonstrated understanding* of key issues involved in successfully implementing energy efficiency and low-income assistance programs.
  5. *Organization Qualifications/Consultant References*: Previous experience in projects related to the outlined Scope of Work.
  6. *Project Cost*: Ability to deliver project services at a fair and reasonable cost.

## **VIII. GENERAL CONDITIONS**

- A. DCE shall not, in any event, be liable for any pre-contractual expenses incurred by the consultant. Pre-contractual expenses are defined as expenses incurred by the consultant in:
  - Preparing the Proposal;
  - Submitting the Proposal to DCE; and,
  - Any other expenses incurred by the consultant prior to an executed agreement
- B. DCE reserves the right to withdraw this RFP at any time without prior notice.
- C. Any contract awarded for this role will be made to the organization that, in the opinion of DCE, is best qualified.
- D. DCE reserves the right to reject all proposals if it determines, in its sole discretion, that adequate services cannot be obtained at a fair and reasonable cost that is within the budget available for the project.
- E. DCE further reserves the right to waive any irregularities in the proposals received in this response for Request for Proposals (RFP).
- F. DCE reserves the right to split or award the contract in any manner determined to be the most advantageous to DCE.
- G. DCE makes no representations that any Agreement will be awarded to any organization responding to this RFP. DCE expressly reserves the right to postpone reviewing the Proposal for its own convenience and to reject any and all Proposals responding to this RFP without indicating any reasons for such rejection(s).

## **IX. INSURANCE**

Before signing a contract or commencing work on this project, the contractor shall provide evidence that the following insurance requirements are in place. Please indicate if your organization would be able to provide proof of the DCE insurance requirement as follows:

- A. Worker's Compensation as required by law;
- B. A One Million Dollar (\$1,000,000) comprehensive general liability policy;
- C. Professional Liability.

Each policy of insurance required by this section shall provide for no less than 30 days advance notice to DCE prior to cancellation. Each policy shall be endorsed to waive all right of subrogation against DCE by reason of any payment made for claims under the above coverage. DCE will work with the selected consultant(s) to confirm that appropriate insurance requirements are met.