



# REQUEST FOR INFORMATION

## Online Customer Resource Center

### Providing Energy-Related Information and Enabling Services to SVCE Customers

Issued: May 17, 2019

Responses Due: June 14, 2019 by 5:00 PM Pacific Time

#### 1. Description

- 1.1 Silicon Valley Clean Energy (SVCE) is planning to deploy an online "Customer Resource Center" (CRC) that will educate customers about energy use, associated emissions, building and vehicle electrification – and then help to enable subsequent actions. SVCE believes there is a large ecosystem of potential information services, with a diverse range of functionality, that could support the CRC. We would like to learn more about them via this RFI. The RFI provides some insight into SVCE's goals, current customer information and marketing assets, and expected areas of focus to allow Respondents the ability to tailor the explanation of their solution to SVCE's specific implementation.
- 1.2 THIS IS A REQUEST FOR INFORMATION (RFI) ONLY. This RFI is issued solely for information and planning purposes – it does not constitute a Request for Proposal (RFP) or a promise to issue an RFP in the future. This request for information does not commit SVCE to contract for any supply or service whatsoever. Further, SVCE is not at this time seeking proposals and will not accept unsolicited proposals. Respondents are advised that SVCE will not pay for any information or administrative costs incurred in response to this RFI, all costs associated with responding to this RFI will be solely at the interested party's expense. Not responding to this RFI does not preclude participation in any future RFP, if any is issued. If an RFP is released, it will be posted on the SVCE website at <https://svcleanenergy.org/solicitations>. It is the responsibility of the potential offerors to monitor the site for additional information pertaining to any future RFP.
- 1.3 SVCE is intending to learn from this RFI to help us understand if, and how best, to scope a Customer Resource Center RFP in the coming months. Organizations interested in responding to such a future RFP are encouraged to respond to this RFI, to help ensure that SVCE is aware of a broad range of potential strategies for our CRC.

## 2. Background

- 2.1 SVCE, a Community Choice Energy agency, is redefining the local electricity market and providing our residents and businesses with new clean energy choices— renewable and carbon-free electricity at competitive rates. SVCE was formed as a Joint Powers Authority in 2016, and now serves approximately 270,000 residential and commercial electricity customers across a service area comprised of the following thirteen communities: Campbell, Cupertino, Gilroy, Los Altos, Los Altos Hills, Los Gatos, Milpitas, Monte Sereno, Morgan Hill, Mountain View, Saratoga, Sunnyvale and unincorporated Santa Clara County. Approximately 97% of electricity customers in SVCE’s service area receive their electricity from SVCE. For more information on SVCE, please visit: <https://www.svcleanenergy.org/>.
- 2.2 As SVCE was formed to support our communities in reducing their greenhouse gas emissions, we aim to provide our customers with resources that can help them understand their energy use and how it relates to their carbon footprint. SVCE is also in the process of launching a broad set of programs supporting decarbonization efforts and needs an online resource to support customers engaging with these programs and related activities. To learn more about SVCE’s overarching program strategy, please visit: <https://www.svcleanenergy.org/programs/>.

## 3. Requested Information

- 3.1 Overview: SVCE is planning to define and deploy an online Customer Resource Center to support and engage our customers around energy and electrification topics. The CRC is envisioned as a resource that will help customers reach certain outcomes, such as becoming more educated on topics of interest or selecting products/services. SVCE is seeking information from Respondents on how their solutions could serve as key elements in SVCE’s planned online Customer Resource Center.
- 3.2 SVCE Intent and Goals: SVCE is considering how to best provide an online CRC to our customers. CRC elements should be easily-accessed via our SVCE website – whether fully integrated within SVCE’s existing (or future) webpages or easily accessed through a link on our homepage and routed to a white-labeled third-party tool. This CRC is intended to be a way for customers to engage with SVCE on clean energy topics. This engagement is very important to SVCE’s goal to be a useful and effective advisor to our customers.

SVCE envisions that customer visits to the CRC will be supported both directly and indirectly through outbound SVCE communications, including email or direct mail campaigns, events, and other channels. SVCE maintains extensive and detailed customer contact and energy usage information. While this information is customer-confidential, it could be used by SVCE to help direct customers to information, resources or services available on the SVCE website that may be of particular interest. Customers or other site visitors would engage with these services as they choose.

One key question for Respondents to this RFI to address is how the solution would help SVCE engage people in a way that increases user interaction and satisfaction and keeps them coming back. It is essential that solutions consider user experience for all types of customers. Our goal is to offer our customers simple, quick and easy-to-use services and resources.

While SVCE's main goal with the CRC is to provide a helpful resource to our customers, we also have some organizational outcomes that we would like to accomplish. The CRC should build regional, community awareness of the SVCE brand, programs and clean energy topics. It should increase and streamline enrollment in SVCE's programs. The CRC should also enable behavioral changes among our customers to improve their energy usage, whether through participation in programs or on their own. Finally, SVCE believes the CRC is an opportunity to grow a community of customers who will engage with our website and materials in an ongoing, recurrent manner.

While SVCE envisions the CRC as a unified tool for our customers, we don't expect any Respondent to necessarily have a solution with the full range of topics and outcomes we are looking to support. SVCE welcomes responses to the RFI from Respondents who are describing one or more solutions addressing a subset of overall CRC requirements. However, Respondents should indicate how their solution(s) would work effectively within the CRC as a whole. SVCE would like to know how Respondents suggest designing the larger CRC website to accommodate their solution(s).

- 3.3 **Target Audiences:** The customers that SVCE hopes to reach via the CRC include residential and commercial customers. The bulk of our customers are residential (approximately 250,000), so a robust suite of resources for them is vital. Single family home residents and multi-

unit dwelling residents must each have access to targeted, applicable resources within the CRC. While our early-adopter and sustainability-minded customers (estimated to be ~20% of SVCE customers) are the most likely to seek out information on the CRC, ideally a CRC would also serve harder-to-reach customers who are not already interested. These harder-to-reach customers include residents in multi-unit dwellings and disadvantaged communities.

Commercial customers should also be able to engage with the CRC, though it is more likely that CRC content would be most relevant to small and medium commercial businesses rather than large commercial businesses. There are approximately 20,000 small and medium commercial customer accounts in SVCE territory.

- 3.4 Innovative Components: SVCE has an organizational focus on leveraging innovative ideas and strategies to pursue our goals. Responses to this RFI are encouraged to include components beyond those mentioned in the RFI if the Respondent believes that they would serve SVCE's goals. Innovative components could include online modules outside of what is scoped in the RFI, an integrated and unique marketing campaign, development of a corresponding set of physical resources, or something else not yet considered by SVCE.
- 3.5 Back-End Integration with Other Resources: SVCE's vision of the CRC is that it should exist in a context with our other systems and resources. Particularly in terms of increasing engagement, SVCE is interested in exploring if or how integration of new CRC resources with existing SVCE information (e.g. customer billing information, detailed electricity and gas usage data, CRM and call center data, or other customer demographic information) might be beneficial to the customer. Respondents are encouraged to indicate how solutions would leverage the available data to improve customer engagement. However, SVCE would also like to understand what a 'leaner' implementation might look like in the near-term (i.e. without the additional costs associated with this systems integration). Respondents should be sure to separate out these integration costs when presenting cost information, along with indicating if the functionality of the presented solution *requires* integration with any specific systems.
- 3.6 Sample Customer Outcomes: SVCE has developed a representative list of key outcomes that we believe a successful CRC would help customers achieve. This set of outcomes can be applied to each topic within the CRC. As previously explained, responses to this RFI are

encouraged to address any subset of these outcomes and to go beyond them.

- 3.6.1 **Awareness and Education:** Help introduce customers on a concept level to new behaviors, products or services - general information and benefits.
  - 3.6.2 **Consideration and Decision-Making:** Provide necessary data and information to aid the customer in comparing options and choosing a behavior, product or service.
  - 3.6.3 **Implementation:** After deciding on pursuing a behavior, product or service, the CRC should help customers with key steps needed to install and/or utilize.
- 3.7 Sample Topic Areas: SVCE has developed a representative list of topic areas that we believe will be a part of a successful CRC. The CRC will help customers reach various outcomes for each of these topics. As previously explained, responses to this RFI are encouraged to address any subset of these issues and to go beyond them. Check the SVCE website for a complete list of planned programs and program areas.
- 3.7.1 **Energy and Emissions**
    - 3.7.1.1 *Energy Use:* fundamental energy concepts, managing consumption and bills.
    - 3.7.1.2 *Emissions and Carbon Footprint:* customer-focused and SVCE territory-wide emissions, impacts, goals, and key steps for reducing carbon impacts.
    - 3.7.1.3 *Energy Efficiency:* comfort and cost savings.
    - 3.7.1.4 *Grid Integration:* demand response and intelligent controls.
  - 3.7.2 **Mobility**
    - 3.7.2.1 *Electric Vehicles:* transition from gasoline and diesel to clean electricity for all vehicle use.
    - 3.7.2.2 *Electric Vehicle Charging:* public and private charging options and technologies.
  - 3.7.3 **Built Environment** (all-electric buildings, SVCE's FutureFit Home concept)
    - 3.7.3.1 *Space Heating/Cooling:* electric heat pump technologies and cost impacts.
    - 3.7.3.2 *Water Heating:* electric heat pump technologies and cost impacts.

- 3.7.3.3 *Solar PV:* technologies and ongoing cost impacts.
- 3.7.3.4 *Battery Storage:* resiliency, cost impacts and technologies.
- 3.7.3.5 *Smart Thermostats and Controls:* technologies, comfort and cost impacts.
- 3.7.3.6 *Cooking and Other Appliances:* technologies and cost impacts.

- 3.8 Matrix Framework: Outcomes and topic areas can be thought about in a matrix framework. This framework represents the general set of requirements that SVCE is aiming to address with our CRC. As stated previously, Respondents are encouraged to add/adjust columns or rows for new or more-applicable outcomes and topic areas. Respondents should indicate which of the matrix cells are addressed by their solution(s).

Additionally, Respondents should indicate if and how their solution(s) would integrate with the other solutions and parent webpages that might make up the CRC. Part of SVCE's intent in issuing this RFI is to understand how multiple solutions might work together within a unified CRC. SVCE is interested in learning from any past successes in developing the suggested solution(s) as a part of a comprehensive set of resources akin to this CRC concept.

		OUTCOMES			
		Awareness and Education	Consideration and Decision-Making	Implementation	Any Respondent-Identified Outcome(s)
Energy and Emissions	Energy Use				
	Emissions and Carbon Footprint				
	Energy Efficiency				
	Grid Integration				
Mobility	Electric Vehicles				
	Electric Vehicle Charging				
Built Environment	Space Heating/Cooling				
	Water Heating				
	Solar PV				
	Battery Storage				
	Smart Thermostats and Controls				
	Cooking and Other Appliances				
	Any Respondent-Identified Topic Area(s)				

#### 4. Responses

- 4.1 Interested parties are requested to respond to this RFI with **both** a written report and a slide deck. The written report should not exceed five (5) pages, following the outline given below in Section 4.3. The slide deck should not exceed thirty (30) slides and should be focused on describing the solution the Respondent is suggesting to SVCE, following the outline given below in Section 4.4.
- 4.2 Reports and presentations (both in PDF format) are due no later than **June 14<sup>th</sup>, 2019 at 5:00 PM Pacific Time**. Responses will be accepted via email only and shall be submitted to



[innovation@svcleanenergy.org](mailto:innovation@svcleanenergy.org). Proprietary information, if any, should be minimized and **MUST BE CLEARLY MARKED**. To aid SVCE, please segregate proprietary information. Please be advised that all submissions become SVCE property and will not be returned.

- 4.3 The written report should be structured according to the following:
  - 4.3.1 Section 1 shall provide administrative information, and shall include as a minimum: name, mailing address, phone number, and email of designated point of contact.
  - 4.3.2 Section 2 shall provide a brief summary of the solution being described in the response.
  - 4.3.3 Section 3 shall provide information on the Respondent's organization, which should include background on the organization, previous customers served by the solution, reference websites that SVCE can visit to see the solution, overview of organization (including number of employees, revenues, legal structure and ownership), and description of primary business model(s).
  - 4.3.4 Section 4 shall provide cost information associated with the described solution. Respondents *will not* be expected to be bound by the cost information provided in this RFI in the event that SVCE chooses to later issue an RFP. This information is only intended to help SVCE understand the Respondent's business model and how they would engage with SVCE.
- 4.4 The slide deck should be structured according to the following:
  - 4.4.1 Section 1 shall provide the name of the Respondent's organization and a brief summary of the solution being described.
  - 4.4.2 Section 2 shall fully describe the solution that the Respondent is suggesting to SVCE. Sufficient detail and images should be included for SVCE to understand the intent of the solution, how it works, and how it would fit within the context of the broad CRC and SVCE website.

## **5. Pre-Response Teleconference**

- 5.1 SVCE will hold a pre-response teleconference to provide a brief overview of our goals for the CRC and what we hope to learn from this RFI. Interested parties are encouraged to attend and ask any





questions they may have. SVCE shall not be responsible for nor be bound by any oral instructions, interpretations or explanations issued by SVCE or its representatives. The teleconference will be held on **June 3<sup>rd</sup>, 2019 from 1:00 PM to 2:00 PM Pacific Time**. The call-in information is +1-510-338-9438 USA Toll, access code 628 070 269.

## **6. Questions**

- 6.1 Questions regarding this announcement shall be submitted in writing by e-mail to [innovation@svcleanenergy.org](mailto:innovation@svcleanenergy.org). Verbal questions will NOT be accepted. Questions will be aggregated and answered in an addendum posted on the SVCE solicitation webpage. Accordingly, questions shall NOT contain proprietary or classified information. Questions are due by **June 5<sup>th</sup>, 2019 at 5:00 PM Pacific Time**.

## **7. Follow-Up Discussions**

- 7.1 SVCE representatives may or may not choose to meet with Respondents. Such discussions would only be intended to get further clarification of suggested solutions and ensure SVCE understands all requirements and risks.

## **8. Summary**

- 8.1 THIS IS A REQUEST FOR INFORMATION (RFI) ONLY to identify sources that can provide information on developing an SVCE online Customer Resource Center. The information provided in the RFI is subject to change and is not binding on SVCE. SVCE has not made a commitment to procure any of the items discussed, and release of this RFI should not be construed as such a commitment or as authorization to incur cost for which reimbursement would be required or sought. All submissions become SVCE property and will not be returned.