ADDENDUM NUMBER 1: CLARIFICATIONS, QUESTIONS AND ANSWERS

FOR

CUSTOMER RESOURCE CENTER

RFP Issued: September 9, 2019

Addendum Number 1 Issued: September 24, 2019

1. *What is the budget for this program? How will it be applied across the scope (i.e. are there any parameters for allocation)?*
   a. The board has approved $350,000 over a two-year period for this program. This should be regarded as a general estimate of the budget for the entire program and has not been sub-allocated into elements of the scope.

2. *For the Act section of the scope, is SVCE looking for respondents to provide a list of installers?*
   a. It depends on the solution being proposed and the technology being addressed. If proposing a tool with a list of installers, solution providers may offer a list that includes relationships that they vet and manage, or integration with another recommendation or review function that connects customers to contractors and installers.

3. *What buckets within the SVCE budget or budget components will the funding come from?*
   a. The budget for this program was approved with the SVCE Decarbonization Programs Roadmap in December 2018.

4. *Please clarify what the PowerPoint slides are, as listed in Section 5: Proposal Submittal on page 5 of the RFP.*
   a. If a respondent wishes to provide a slide deck to support their proposed solutions, they may submit a PowerPoint deck, not to exceed 30 slides for each Section (Inspire, Educate, Act). Some solution providers may wish to utilize a PowerPoint to provide screenshots of their solutions, and a marketing firm may want to include campaign or web creative samples.

5. *Regarding the media strategy, does the budget include media buys?*
   a. The approved budget described in question 1 only includes media planning. Budget for media buys will be determined separately based on the recommendations provided by the selected bidder. SVCE may choose to have the bidder execute the media buys, which would include additional funding.

6. *What is the length of the contract SVCE plans to execute?*
   a. This is to be determined based on the proposals received and the respondents' business models. The contract with a marketing firm is not expected to last for more than a year. These details will be negotiated during contracting.

7. *In the Act section, if a marketplace is proposed, please elaborate on the purchasing experience, and would SVCE rely on the solution provider to provide and manage inventory?*
   a. SVCE would depend on the solution provider to manage the entire purchasing experience, which would include inventory, shipping and fulfillment.

8. *What is SVCE's current website platform, and would SVCE want to maintain this with the new site to be developed for the CRC?*
   a. The SVCleanEnergy.org website is currently built on WordPress. Staff prefers to maintain this if possible, but we welcome responses that suggest a different platform if it is user friendly, allows for ongoing in-house edits and customization. This will be an important factor in the evaluation of responses that address the website redevelopment.

9. *What resources are SVCE making available to market an online store, including rebates or incentives?*
   a. This CRC will be a major marketing and outreach initiative for SVCE throughout 2020. The CRC Integrated Marketing Strategy, items B.1.15 through B.1.19 outlines the requested tasks that would make up the marketing plan, to be developed by a vendor.
   b. SVCE's current marketing platforms includes an email newsletter, outreach partners and channels, and access to approximately 110,000 customer emails.
   c. SVCE currently offers a rebate for Heat Pump Water Heaters, and future rebate or incentive programs have not been determined.

10. *Does SVCE have the ability to monetize revenue through the site and is that an objective?*
    a. The objective is to break even on a store, if implemented. SVCE is not seeking a profit center to fund other activities. We prefer to pass savings onto customers.

11. *For companies responding to the Act section – could they monetize on lead generation?*
    a. This is acceptable if it is part of the solution provider's business model. We are requesting to know this information in item 3 – organization description and qualifications under the proposal submittal details on page 5.

12. *Does SVCE prefer to work with a single prime or would SVCE award contracts to multiple providers?*
    a. We are likely to award contracts to several providers since this RFP is very robust and will likely have marketing firms responding to the

Inspire section and several solutions providers responding to the Educate and Act sections. We are open to receiving proposals from teams, however we reserve the right to award contracts to separate vendors.

13. *Do the exhibits at the end of the RFP need to be completed?*
    a. No. Page 17 through the end of the document is an example of SVCE's standard service agreement template. See section 7. Note that all respondents must review the standard service agreement template and list all exceptions or requested changes in their response to this RFP; items not excepted will not be open to later negotiation.

14. *Energy efficiency is a very broad topic - what aspects interest SVCE?*
    a. SVCE customers would like to understand more about their energy use and understand where they can make changes. Energy efficiency measures and advice shared in the CRC should be easy and accessible for all customer segments, from those just getting started with learning the basics to more advanced customers, such as our well-informed solar customers.

15. *Of the technology list provided in section A.4, does SVCE have any priorities?*
    a. All topics and technologies listed in the RFP are of interest to SVCE and are intended to be included in a final CRC. However, some technologies are a higher priority due to other ongoing SVCE initiatives and customer desires:
        i. Electric vehicles
        ii. Education around heat pump technologies
        iii. High impact, low cost opportunities (e.g. smart thermostats)
        iv. Solar – a lot of our customers want to go solar and want more info

16. *What are the selection criteria for the winning proposal? Which stakeholders will be involved on the selection committee?*
    a. The selection criteria can be found in Section 6 of the RFP.
    b. To help respondents better understand SVCE's interests by task, the following are provided for illustrative purposes only:
        i. For task B.1 – Inspire: proposals with an excellent creative approach to a difficult topic, and that demonstrate a good understanding of the problem and content knowledge. A compelling website design, strong use of graphics and engaging language will be extremely important for this section.
        ii. For tasks B.2 and B.3 – Educate and Act: tools that demonstrate ease of use for customers, experience in our market/service

area, ease of integration with the to-be developed CRC, high quality of content and service provided, and alignment with the SVCE mission.

c. The selection committee will tentatively include SVCE staff and staff from SVCE's member agencies.

17. *How does SVCE want to leverage existing tools offered by PG&E? Does SVCE want a completely distinct set of resources even if this means it will be redundant in at least some aspects to resources currently offered to SVCE customers by PG&E?*

a. SVCE desires to host all tools under the CRC umbrella for our customers. However, SVCE may or may not want to leverage tools that are the same or similar to those offered by PG&E. This will depend on associated costs to SVCE and specific services or products SVCE is looking to provide that may be distinct from PG&E.

18. *Does SCVE have examples of current websites in deployment whose UX/UI they admire/aspire to have for their new web design?*

a. While we will not share examples of sites we like, in general, the design principles desired include:

    i. Use of graphics and images that inspire customers to learn more and clear, concise messaging that speaks to emotion

    ii. Not text heavy and not too many pages

    iii. Ease of use for visitors, intuitive navigation

    iv. Mobile responsive

    v. Creative and fresh layout

    vi. Strong calls to action that help customers easily understand what they need to know from our site

    vii. Maintain all necessary information, functions and accessibility as the website for a public agency

19. *Regarding the customer support center, can SVCE elaborate more on the type of customer support they are expecting? For example, is it more technical support with the program/website or more subject matter expert support regarding topics like energy efficiency?*

a. It's about topic/content support – providing web-based informational content (higher level), and web-based tools (more detailed info, and as applicable concierge-type service to customers e.g. for buying solar). The context is for SVCE to be able to support our electricity customers with electrification of their homes and vehicles – inspire, educate, and enable action v/v switching from fossil fuels to clean electricity.

20. *Is SVCE's existing data and research centralized in a single platform or location, or is it widely varied from mailing lists to survey data to paper responses?*
    a. Existing research is from a variety of sources, including customer email surveys we have conducted and third-party research.

21. *Is program/website maintenance cost factored into the budget? After the program has launched and the site(s) goes live, is the cost of recurring updates and or maintenance of the site factored in?*
    a. For respondents from marketing firms focused on section B.1, we do not expect ongoing costs to maintain the site after the first year. If respondents want to include ongoing maintenance and updates in their proposals, please provide separate cost estimates and explanation of value to SVCE.
    b. For solutions providers, please include annual licensing fees and ongoing maintenance costs, if applicable.

22. *It seems as though each section is being interpreted as its own site. Is SVCE open to just having one website solution that is able to handle all of the sections?*
    a. As noted in the RFP, we envision that the CRC will be an integral part of our SVCE website, and that third party tools supporting more detailed education (say on EVs) or transaction support (buying products or services) would be accessed via our website, and to the extent possible, be well-integrated with our website. We do not want the overall CRC solution to look like a disconnected set of web-based content and applications. The respondent to task B.1 will help SVCE ensure that the complete CRC feels as seamless and cohesive as possible.

23. *What is the CRM/sales platform that SVCE would prefer solution providers use for selling products to the customer? Is there a sales tool or API that SVCE prefers to use or be compatible with?*
    a. We are not stating a preference – looking for respondents to propose possible solutions.

24. *Was the RFI and/or teleconference a prerequisite for responding?*
    a. No.

27. *At what interval is the electric meter data read and how long does it take from meter reads for SVCE to gain access to this data?*
    a. Electric meter data is available in hourly intervals for residential. There is generally a two- to three-day lag to receive electricity interval data.

28. At what interval(s) is gas meter data read and how long does it take from meter reads for SVCE to gain access to this data?
    a. SVCE will discuss available gas data with selected vendors. SVCE currently only receives this info annually.

29. How does SVCE receive access to data?
    a. We receive data electronically.

30. Does SVCE have access to existing home audit data, such as existing appliance profiles of each home?
    a. SVCE does not have access to existing home audit data. However, SVCE is currently carrying out a DER/Electrification Assessment to guide implementation of SVCE's Decarb Strategy & Programs Roadmap. Aggregate insight from that assessment (i.e. not customer-level information) may be used by the vendor(s) to inform CRC development.

31. How does SVCE currently calculate GHG savings? Is there a specific calculator that is used?
    a. We generally look at SVCE carbon intensity in a given year versus PG&E's carbon intensity.

32. Does SVCE have information on existing EV owners in their service territory?
    a. Yes.

33. Is it more important to communicate to customers in terms of cost savings, kWh savings or GHG savings?
    a. Cost savings and GHG savings are both important.

34. Given that several vendors will collaborate to bring the CRC to life, especially for the Educate and Act sections, would SVCE be open to using subdomains that can be managed by individual vendors? (e.g. the Energy and Emissions section could be under energy.svcleanenergy.org, Mobility could be under mobility.svcleanenergy.org, etc.)
    a. Yes, we would be open to this approach. But it is important that the overall CRC customer experience is cohesive.

35. Can SVCE please confirm the number of customers for whom SVCE has email addresses? Is it the full customer list? How was the list acquired?
    a. We have approximately 110,000 emails out of the 270,000 customers we serve. We received the emails with our customer data.

36. SVCE mentioned detailed customer segmentation - does SVCE have customer segments assigned to individual customers? So, for example, email and address lists by segment?
    a. We can segment customers by town or territory, rate class, solar or discount indicators, and energy use. The customer segmentation we

mentioned during the pre-bid call was an internal exercise we completed to segment residential customers into personas and was not mapped to individual customers.