



## Proposer Questions and SVCE Responses related to Request for Proposals for eHub, an Online Customer Resource Center

*The following questions were submitted by prospective proposers to SVCE before the questions deadline of 5 p.m. PT on January 12, 2024. Responses were posted to [svcleanenergy.org/solicitations](https://svcleanenergy.org/solicitations) on January 17, 2024. All questions received are shown below along with SVCE staff's responses.*

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**1. When will the slide deck be sent out/shared?**

A: Slides and recordings were posted to the [solicitations webpage](#) on January 9, 2024 at 5 p.m. PT.

**2. Can you tell me more about the separation between eHub and the main SVCE website?A:**

eHub is integrated into the existing SVCE website, which has been our preference to drive customers to our website and engage with our resources. eHub then links to external, third party "Assistants." The main eHub pages are part of the SVCE website since we want customers to understand the value and purpose of why we exist, what we're bringing to the community and our mission to decarbonize the region. As an energy provider, we also want customers to have access to resources such as understanding rates and how our charges are presented on PG&E bills. Overall, we have an ambitious mission and so we want customers to learn more about electrification and have that embedded in our marketing and messaging throughout our website.

**3. In the inspire bucket, when you mention sweepstakes etc., are you expecting the vendor to help plan marketing strategies or just build eHub with the capability to feature these different campaigns?**

A: It has worked well for us to be able to rely on the tools available through our partners that we can leverage. We like to run most of our marketing in-house because it allows us to have a comprehensive and holistic view of all our offerings, including eHub, and many others. So, for us to own that has been important, and we would like to continue that. However, we would be interested in a partner who can offer us content and tools that we can leverage.

**4. Can you confirm that you want to refresh the experience of eHub and want to bring it up to speed with SVCE offerings? Are you interested in adding anything new that you don't currently offer in eHub and can you speak on the desires you have?**

A: We want to see it all and want to know what's out there. The times and technology have changed since our last RFP in 2019. In the RFP, it's mentioned that if you see something that isn't clearly called out within the key technologies that we focus on, you are welcome to propose new approaches and focus areas. The newest part in this RFP is we are interested

in having a better understanding of what a personalized customer journey could be. We are open to learning more about what this could look like since there are simple and complex ways to do this.

**5. Will the framework of eHub be on the same domain as [svcleanenergy.org](http://svcleanenergy.org) or a separate domain?**

A: We desire to keep it the same and consistent. We want customers to go to one place to get everything they need. However, we are open to whatever solution would make sense.

**6. Do you have any reference sites for user flow/competitor?**

A: We are not modeling it after any one utility experience or B2C experience. What we are trying to do is to engage with how people use and experience energy and how we can guide them to cleaner solutions i.e. electric vehicles or heat pumps at home. We are open to ideas, and we just want the best experience for customers who are engaging in new territory.

**7. What is the budget for this project?**

A: We are in the process of a budget allocation for this. We can share the historical spending on eHub as a total program because that is public information in our board packets and within our approved budgets. The total program funding over the past four years was \$1.1 million.

**8. On page 28 of the RFP, which portion needs to be filled out?**

A: Nothing needs to be filled out in the sample agreement. The appendix that starts on page 18 is there for informational purposes. We request all bidders to review our standard agreement language and in the RFP, we ask bidders to agree to those terms or let us know what the issues are so that we can have a streamlined contracting process.

**9. Is the goal to continue using the existing third-party services i.e. ZappyRide and Enervee and perhaps work on adding new ones and improving how they work together or is the goal to consolidate and have one app powering all different domains of education, inspiration, and action or something else entirely?**

A: Being true to the competitive solicitation process that we must abide by with our internal policies, everything is on the table. We are focused on what is going to be the best solution to help us achieve our goals. We will see what's out there. We've talked about the success we've enjoyed with our partners to date, but we are opening this up fully and we are looking at it with a fresh set of eyes.

**10. Is there something driving the timing that we should be aware of: soft launch of eHub in August 2024 and a hard launch by October 1, 2024?**

A: This is TBD depending on how sophisticated the tools we select will be to customize or develop. Depending on what we do, the hard launch date of October 1 is to align with the new fiscal year since we're on an October to September fiscal year for our agency. The soft launch is nice to have to work out kinks or get user feedback before it's pushed out to the masses which is why we have that as a deadline.

**11. Is it possible for us to have a list of integrations and third parties? Is it public information about how long the contracts are with SVCE?**

A: Two out of three contracts are public information in our board packets. The contract end date mostly aligns with the end of 2023/2024 fiscal year – September 30, 2024. We are currently working with Zappyride for the EV Assistant, Enervee for the Appliances Assistant, and Electrum for the Solar+Battery Assistant.

**12. What contract term length are you seeking? Is it a 3 year or are you open to looking beyond?**

A: We typically start with a two-to-three-year contract, and then our organization limit is five years, so we do not go beyond that. We would probably do something similar to this first round, which was three years.

**13. Curious if you are differentiating between machine open rates and reliable open rates and which email platform you are currently using?**

A: As a public agency, we are fortunate to utilize Granicus GovDelivery which whitelists our .gov domain to deliver emails to customers and we are tying those email open rates back directly to customer accounts. It's been reliable in that way and very different from other platforms out there that have restrictions with CAN-SPAM laws.

**14. Are you anticipating contracting with multiple entities? Or, do you prefer one primary entity that coordinates across potentially multiple partners?**

A: We are open to either approach. We are more interested in what the proposed solution is overall, whether that is separate contracts with multiple entities, or a single contract under a prime with subcontractors. It is just based on the solution that we think is the best fit to achieve our goals.

**15. Do you have a budget range in mind?**

A: We are in the process of a budget allocation for this. The historical spending on eHub as a total over the past four years was \$1.1 million.

**16. Is your timeline flexible?**

A: It is desired to have a hard launch of October 1, but we understand the launch date will depend on which solutions are selected and how sophisticated potential integrations may be. We are open to a phased approach to launch.

**17. You mentioned this hub could be used for other CCAs. What do you mean by this?**

A: Please see section 9 of the RFP.

**18. Are the translation needs any different for the updated eHub than what exists currently?**

A: The needs are the same, and we are interested in expanding the existing capabilities. The updated eHub must be multilingual (Spanish, Traditional Chinese, and Vietnamese) and it is desired for the selected vendor to support SVCE in language accessibility. *(see section B.1.5 on page 15)*

**19. In the RFP, you mention that the vendor should create personalized high-level education and engaging content that introduces customers to what they can do to use clean energy to help fight climate change, save money, and improve their quality of life. Can you clarify expectations for this? (i.e. research, copywriting, etc.)**

A: The current messaging can be maintained, but we are open to ideas and solutions on how the messaging is presented and could be improved. The expectation is the vendor presents this information when it's technology-specific, i.e. if a vendor has a solution for electric vehicles, the vendor must provide the research, resources and copywriting related to electric vehicles.

**20. What are the main challenges with the eHub from an inspire, educate, and act perspective? Knowing this will better help us put together ideas around recommendations.**

A: The main challenge with eHub is that we are asking customers to make long-term changes, or investments in future electric upgrades that they may not be ready for now. They may come and learn, then we will not know how this may influence future purchasing decisions. Our best way to measure this currently is an annual customer survey. We want customers to understand what they can and need to do to be part of the solutions to climate change through electrification. Overall, we are open to exploring new ways to improve eHub's customer experience and if there are suggested improvements to how the information is presented for customers. (see section A.2 on page 11)

**21. You say that "The eHub interface should seamlessly collaborate and integrate with selected third-party content and tools, SVCE's concierge service, and existing SVCE programs to create a comprehensive customer experience." Recognizing that it's the vendor's job to come up with integrations that could help advance SVCE's goals, can they share a complete list of the systems that could be integrated with the site? I.e. their names, uses, and underlying technologies? (Salesforce CRM is clear enough, but there seem to be a number of others.)**

A: The backend of the SVCE website is through WordPress. All current vendors powering the external assistant tools are white-labeled software solutions on external sites. The seamless collaboration desired is that we want customers to understand that they can move from educational content on the SVCE site to a third party tool, and have the possibility of also enrolling in programs along the way. Currently, this is as simple as making sure SVCE rebates are reflected when pricing information is presented for specific products or technologies. We are also in the process of setting up a program portfolio management tool in 2024, which will tie customer program participation to Salesforce.

**22. There's a requirement in the Act section: "Schedule a delivery and/or installation or any other contractor services with the help of an advisor (EV charger install, heat pump install, solar and storage assessment, etc.)." Is there a specific information source or API with which the site could interact in order to set up these appointments (presumably with a variety of local service providers)?**

A: This is dependent on the bidder's solution.

**23. Also in the Act section, there is a requirement to allow visitors to “purchase a product on the site from a curated list.”**

- a. The text that follows implies that the vendor is responsible for curating this list somehow, based on some provided criteria. Is that accurate, or will SVCE provide/manage that list of products?**

A: The outcome of the list is contingent upon the proposed solution from the bidder. SVCE will review and approve the list of products provided by the vendor, and we do not desire to provide this list of products, other than requesting potential additions/customization as it relates to program requirements.

- b. With which retailers will these transactions ultimately happen — SVCE itself, some single entity, or a variety of stores?**

A: SVCE is seeking a bidder with an existing product that includes the mentioned features. The intention is for SVCE to integrate the bidder’s existing product into eHub. Please see SVCE’s existing Appliances Assistant as an example: <https://appliances.svcleanenergy.org/>.

**24. Can we assume that SVCE can provide both the list of Zip Code-specific incentives/rebates and the list of public EV charging stations, or should we plan to find a reliable outside API for this information?**

A: This is dependent on the bidder’s solution (*see section A.6 on page 13*). Most of this information is already public information, curated across a variety of existing platforms and websites.

**25. Does the financing solution for customers already exist?**

A: There are financing solutions available, but SVCE has not yet made these kinds of features available to customers, but is interested in the capability of doing so with eHub 2.0.

**26. The eHub Digital Engagement Strategy, included under the Inspire scope of work, represent a very different skill set and expertise. Would you consider splitting out these marketing tasks from the core eHub framework?**

A: Bidders are encouraged to bid on specific sections of the scope that align with their solutions (*see section B.1 on page 14*). While SVCE is not explicitly seeking marketing support or a redesign of the website, we are open to enhancements focused on improving user experience, connecting customers to SVCE programs, and increasing overall customer engagement.

**27. To explicitly confirm, SVCE is expecting a response for both (1) the core ehub experience located at <https://svcleanenergy.org/ehub/>, and (2) individual partner sections such as <https://svcleanenergy.org/drive-electric/>?**

A: (*see answer to #26*) Bidders are encouraged to propose a solution that aligns with any section of the scope.

**28. If a vendor would like to submit two different strategies (i.e., one that includes management of the top-level eHub and one without), should we submit two proposals?**

A: It would be our preference to submit both strategies within one proposal.

**29. What are key Wordpress features/functionality that makes it appealing for SVCE?**

A: Wordpress is appealing to SVCE because it is a simple CMS and gives SVCE full control of edits and updates that could be made quickly on the website. The nature of our work often requires us to make urgent changes and we need that kind of flexibility and control.

**30. If SVCE remains on Wordpress and managed by the current partner (who we're assuming manages the whole .com), would SVCE be open to design suggestions/feedback (without the vendor being responsible for implementation of aforementioned design suggestions)?**

A: SVCE staff manages the Wordpress site and SVCE has a web developer on contract to assist with design changes. SVCE is open to any design suggestions/feedback, especially as it could help improve customer experience.

**31. Is SVCE open to migrating to a standalone eHub such as <https://ehub.svcleanenergy.org>?**

A: We are open to migrating to a standalone eHub if there is a good reason within the solution proposed. We prefer to keep it the same and consistent because we want our customers to understand our decarbonization mission and want customers to go to one place to get everything they need. However, we are open to whatever solution would make sense.

**32. Bellawatt has positive relationships with some back-end systems. To keep customer integration costs low, could SVCE share their vendor for their Customer Information System and Billing System?**

A: Yes, we use Calpine Energy Solutions.

**33. Does SVCE currently have any paid marketing strategies (ie, google AdWords)?**

A: Yes, we leverage a diverse range of digital platforms along with out-of-home and print channels. Additionally, we have a contracted creative agency to support our marketing initiatives.

**34. For tools such as "calculators, estimators, advisors, buyers guides, decarbonization scores, reviews/ratings, charts, etc," how involved does SVCE want to be in designing the components of the tools (ie, the calculation methodologies, the design, etc).**

A: SVCE is actively engaged in the collaborative design process for tools such as calculators, estimators, advisors, buyers guides, decarbonization scores, reviews/ratings, charts, etc. Our involvement extends to comprehending the development of calculation methodologies, contributing to the integration of SVCE rates, and maintaining the consistency of SVCE messaging, tone, and brand. This collaborative effort is essential to ensure that the tools align with SVCE's vision and objectives.

**35. How important is a cart / point-of-sale experience?**

A: It is desired to enable customers to take action by purchasing a product on the site and claiming a promotional rebate on selected products during the purchase process.

**36. What is SVCE's current demand response strategy?**

A: SVCE is planning a Virtual Power Plant initiative which would be a separate solicitation process. If a vendor currently has a solution that integrates with Demand Response products, please specify that in your response.

**37. For installation features, would SVCE prefer an in-house installer network vs leveraging existing partner networks (i.e. big box retailers, Switch Is On, etc.)**

A: We remain flexible and open to either of the proposed solutions.

**38. How does SVCE anticipate vendors accessing customer data (e.g. API, SSO)? Is there a preference for supporting a "logged in" state?**

A: SVCE welcomes vendor proposals regarding the method for accessing customer data. We are interested in understanding the advantages and functionalities associated with different approaches. Any insights on supporting a "logged in" state are appreciated.