



Date: July 16, 2015

Subject: Addendum No. 2 to Questions and Responses for Alameda Municipal Power Request for Proposal (RFP) Residential Rebate Program Administration Specification No. PS 07-15-02

Proposal Due Date: 3:00 p.m. Pacific Time, Wednesday, July 29, 2015

Please note the following changes, corrections, and clarifications that are hereby incorporated to the requirements of the RFP:

Question #1 What is the expected date for responses to bidder questions?

Response #1 All responses to questions submitted for Specification No. PS 07-15-02 have been posted effective July 16, 2015.

Question #2 Does the total compensation identified as not to exceed \$50,000 include start-up fees? If not, is there an identified budget for start-up?

Response #2 Please see Addendum No. 1 posted on July 9, 2015. Addendum No. 1 corrected Attachment B to reflect the correct Standard Contractor Agreement for the Residential Rebate Program Administration. The revised Attachment B-1 does not contain an amount for compensation. The contracted compensation will be based on the negotiated amount with the vendor awarded the contract.

Question #3 On p.2 of Attachment B Contractor Agreement it states "total compensation for identified work scope is not to exceed amount of \$50,000". Are we correct in assuming that AMP only intends to fund \$50k for two full years of rebate administration plus development of the website/marketplace?

Response #3 Please see Addendum No. 1 posted on July 9, 2015. Addendum No. 1 corrected Attachment B to reflect the correct Standard Contractor Agreement for the Residential Rebate Program Administration. The revised Attachment B-1 does not contain an amount for compensation. The contracted compensation will be based on the negotiated amount with

the vendor awarded the contract.

Question #4 Will Alameda Municipal Power consider submissions from potential Contractors that include the use of designated Subcontractors for certain of the services requested in its RFP?

Response #4 Alameda Municipal Power (AMP) will not accept a partial solution to the RFP. However, a complete solution that uses Subcontractors, for example, to handle rebate processing, is acceptable.

Please follow all guidelines for Subcontractors, including listing the Subcontractors, per 2.b. If applicable, subcontractors: List subcontractors with individual addresses, telephone numbers, facsimile numbers, email addresses, and areas of expertise.

Question #5 Is there an anticipated date that the online marketplace would be live to residential customers?

Response #5 Per Attachment D, question 28, "What is the expected implementation period for this platform?" AMP will be including the time to launch in the evaluation criteria. It is expected that work will commence with the signing of the contract. If project work cannot begin until a later date, that information is needed in the response.

Ideally, AMP would prefer a solution that is live in January 2016. However, this is a long-term solution, see I. Introduction, "AMP intends to issue a two-year term contract for these services. The contract will have the option to renew for up to six (6) additional years." Due to the nature of the project, AMP values a solution that best serves our customers over a solution that is ready a little bit more quickly.

Question #6 Can AMP provide a desired program launch date for the residential rebate program administration, ie., the earliest date a PA can expect rebate applications to be submitted?

Response #6 Please see Response #5.

Question #7 In regards to 6a (attachment A): 1. Will Alameda look for the vendor to process the rebates for lighting programs, or just offer information on where to find upstream LED bulbs at participating retailers?

Response #7 AMP would like to offer both LED options to customers – the upstream program (no rebate needed through this solution), as well as a customer-choice rebate program (offered through this online solution).

AMP's main concern is that the LEDs purchased in Alameda, through the upstream program (Greenlite LEDs), will not be rebated again through the online solution. If the PA is able to offer information about where to find the upstream LEDs at participating retailers, that is a useful feature that should be included in the PA's proposal.

Question #8 Will customers access the rebate form through the AMP website, or is the vendor to create a standalone website? We are referring to section B. Purpose of the Request on p.4 of the RFP that states "Program administrator [will] provide an AMP-branded, user-friendly online marketplace for residential customers" – Can you clarify what this means?

Response #8 AMP expects that the online marketplace (a website) will be hosted by the PA and accessible by a link through AMP's own website.

Question #9 Should the rebate platform include educational info regarding rebated technologies, conservation tips, etc.? Or does AMP provide that information on its website?

Response #9 It is not necessary for the rebate platform to also include educational information.

AMP does currently have educational information on our website and will add more information as we include additional rebate categories, see <http://www.alamedamp.com/for-your-home> and <http://www.alamedamp.com/for-your-home/rebates-and-incentives-residential> for examples.

Question #10 Is there an existing database of record which the chosen administrator will be required to sync with through web services/other? Or is the selected administrator permitted to use their own database as a stand-alone system?

Response #10 The PA will not be required to sync with an existing database of record. The PA will be permitted to use their own database as a stand-alone system.

If the PA needs a copy of the full residential customer list, that need should be indicated in the proposal. AMP is able to provide a list via CSV file, with the PA and AMP agreeing on a timeframe for AMP to provide regular updates.

Question #11 Will the PA be required to upload data into an existing AMP system or data management platform?

Response #11 Please see Response #10.

Question #12 When verifying for previous participation – will you be providing us with a report or a digital database that we can verify against?

Response #12 Yes, AMP will provide an Excel file of previous program participation as needed.

Question #13 Is AMP going to provide customers' previous rebate records to facilitate limiting based on frequency?

Response #13 Please see Response #12.

Question #14 Does AMP require a customer's wet signature or equivalent on each rebate application?

Response #14 AMP does not require a customer's wet signature specifically on each rebate application. An electronic "signature" or scanned signature is acceptable.

Question #15 Will everything be on-line or will there be any paper based processes?

Response #15 The "platform," or marketplace will be online, see Response #8.

AMP expects that the PA has the ability to manage and process both a full online application as well as, by customer request, a paper-based application as described in Attachment A.

AMP assumes that the rebate itself will be paper (check or pre-paid debit card) and will be mailed to the rebate recipient. If there are non-paper solutions to the rebate (for those customers that operate online), AMP is open to alternatives.

Question #16 Will it be acceptable if the mailing address is out of state? Or should this be made to look in-state and then arrange for mail to be forwarded in bulk?

Response #16 An out-of-state mailing address is acceptable. Adding the AMP logo to the envelope would be a good addition to the AMP branding as discussed in Attachment A, Section 2. b-c.

Question #17 Will Alameda power be managing the checking account for the issued rebates? If not, who will be responsible for pre-funding the account, the PA or Alameda Municipal Power?

Response #17 AMP currently handles rebates issued by a PA in the following manner: the PA issues AMP an invoice (monthly, in this case), AMP pays the PA, then the PA uses these funds to pay the rebates. The PA could, alternatively, pay the rebates first, then invoice AMP, and then receive reimbursement by AMP.

Question #18 Regarding questions 26 through 28, “Does the platform provide recycling services”; Is this just helping the customer find a location, or are we being asked to manage the recycling process? IE tracking pickup, recycling certification. Will it be sufficient to simply direct the rebate applicant/recipient to a participating recycling center that can be contacted to arrange pickup or accept their recycled product?

Response #18 AMP’s current refrigerator and freezer rebate requires customers to have their old (or second) refrigerator/freezer to be picked up by AMP’s recycler so that AMP is able to verify that the old appliance is not in use any longer (for increased EE savings).
See <http://www.alamedamp.com/refrigerator-programs> for an explanation of how customers interact with our current program, which includes a rebate *just* for second refrigerator pick-up

Ideally, the PA would be able to coordinate the pick-up with the recycler and customer and the pick-up would be mandatory to participate in the rebate program (particularly for freezers and refrigerators). AMP’s current program has pick-ups twice a month. These dates are pre-agreed upon by the recycler and the refrigerator rebate program administrator. The PA sends the pick-up information to the recycler. The recycler then communicates the pick-up status back to the PA, as well as to AMP, via an invoice.

AMP can be invoiced directly by the recycler and currently has a relationship with a recycler for the freezer and refrigerator program.

If the PA is able to use another means of proving that the old appliance was properly recycled (via pick-up by retailer, or other), AMP is also open to this option.

The PA may also propose to direct the rebate applicant to a participating recycling center.

Please describe the process, or no process, in the proposal.

Question #19 In regards to 6 f, g, &h (attachment A): 1. Will Alameda provide a list of approved recyclers for the mentioned categories (refrigerators, freezers, washing machines, water heaters, dyers). 2. In what capacity does Alameda see the PA “ability to work with a recycler”? 3. Provide insight between 6f and 6h.

Response #19 AMP currently works with an e-waste and Freon recovery hauler/recycler and for the existing refrigerator/freezer rebate program. There are other vendors in the area that supply this service, but AMP does not currently contract with these vendors. If the PA uses a specific service, please describe in the proposal. AMP is open to other vendors.

Please see Response #19.

Question #20 Does AMP require the Program Administrator to make calls to set appointments for appliance recycling?

Response #20 Please see Response #19. The PA may need to receive calls, email, or online requests to set-up appointments for appliance recycling.

Question #21 Does AMP require the Program Administrator make appointment reminder calls for appliance recycling?

Response #21 No, AMP does not require the PA to make appointment reminder calls for appliance recycling pick-up.

Question #22 What are the required hours to have “Live Operators” for the call center (assuming that customers can do Automated IVR Status lookup 24/7)?

Response #22 Per Attachment A, 1.b, AMP does not require a “live operator,” only “Perform all customer service-related functions by serving as the interface with utility customers to answer questions and assist with rebate application completion. Customers should be able to ask questions via email and telephone.”

At a minimum, the telephone assistance may be the ability for a customer to leave a voicemail, with a call returned within 24 hours (Monday through Friday).

On a higher end, available hours may match AMP’s Customer Service Representative hours, Monday - Thursday: 8 a.m. - 5 p.m., Friday: 8:00 am -

9 a.m. and 10 a.m. - 5 p.m. Pacific time.

Question #23 Can you please provide an estimate of call volume?

Response #23 Since this is such a huge change for AMP and for AMP's customers, it is really difficult to estimate call volume.

The City of Alameda, AMP's service territory, is home to about 77,000 residents and has roughly 30,000 housing units. Roughly half of the population is renters.

AMP's customer service team fields between 2,000 and 3,300 calls a month; however, the vast majority of these are regarding bill payment.

Question #24 Can you please include high and low volume estimates, i.e. peaks and valleys?

Response #24 Please see Response #23.

Question #25 Can you please provide an estimate of the average handle time (call length) of the calls? Again, a range will be fine.

Response #25 Please see Response #23.

AMP does not have much experience fielding these types of calls, since this is a new rebate methodology and many of these are new programs.

The current LED program (<http://www.alamedamp.com/ledrebate>) phone calls range from a simple one-minute call to confirm how to fill out the application form to longer 20 minute calls regarding LEDs and energy use in general.

AMP expects the PA to manage, at a minimum, calls regarding the rebate process, website issues, timing, rules, and eligibility. Specific customer questions about products and general EE questions can eventually be turned back over to AMP's EE program manager.

Question #26 Does AMP have a preference for rebate processing call support hours of operation? For example, 8 am – 5 pm, Mon-Fri PST, or 7am-7p Mon-Fri? Is AMP looking for weekend or 24/7 coverage?

Response #26 Please see Response #22.

Question #27 Does AMP anticipate any outbound calling be required in the course of this

project?

Response #27 AMP anticipates outbound calling only in order to return customer calls.

Question #28 Is AMP interested in the Program Administrator making follow up customer satisfaction calls?

Response #28 AMP does not require the PA to make follow-up customer satisfaction calls, but is always interested in hearing customer feedback.

Question #29 How is the current customer service/call center support being handled today?

Response #29 Please see <http://www.alamedamp.com/customer-service/contact-us> for AMP's standard customer service support information. AMP's CSR team is able to answer basic questions regarding AMP's current rebate offerings.

For current residential rebate programs, please see:

1. <http://www.alamedamp.com/refrigerator-programs> for refrigerators and freezers, which is currently managed by a third-party. AMP's residential energy efficiency program manager handles escalated inquiries.
2. The LED program, <http://www.alamedamp.com/ledrebate>, is managed by AMP. The ledrebate@alamedamp.com email address, as well as escalated calls and in-depth product discussion is handled by AMP's residential energy efficiency program manager.

Question #30 Do you have a Service Level Goal for the customer service/call center perspective for this project (ex. 80% of call answered within 40 seconds)?

Response #30 AMP does not have a specified Service Level Goal, but does expect good customer service. Call and email response times are, ideally, clearly posted on the website so that customers know what to expect.

AMP would like to see calls and emails returned within 24-48 hours, Monday through Friday, with weekend inquiries managed on Monday and Tuesday.

Question #31 What language capabilities will be needed? What percent of calls have Spanish language requirements? Other non-English language requirements?

Response #31 Non-English language calls may be forwarded to AMP.

Question #32 What are AMP's reporting requirements for call center services?

Response #32 AMP does not have specific reporting requirements for call center services. AMP would like to receive information regarding number of inquiries via phone, email, and online. Additional information regarding the nature of the inquiry would be nice to have, but not a requirement.

Question #33 In regards to 1g (attachment A): 1. Are there specific style of reports that Alameda would like to see for this information?

Response #33 AMP expects reporting information in Excel or CSV. For 1g, AMP will provide the utility-specified amount per rebate category and the PA will show monthly progress for each category. This may be the same report as requested in Attachment A, Section 5.

Question #34 Does AMP anticipate any outreach services would be included to coordinate with retailers within the service territory that program measures would be purchased by participants in order to educate them on the program?

Response #34 No, AMP does not anticipate any outreach services to coordinate with retailers. AMP will be marketing the program to our customers directly, rather than with retailers (which are mostly outside of AMP's service territory and often mix-up AMP with our neighboring IOU, Pacific Gas & Electric).

Question #35 Does AMP anticipate any marketing services would be included to collaborate with local retailers (big box) or online retailers that customers would be driven to from the online marketplace?

Response #35 Please see Response #34.

To assure that all Proposers have received this Addendum No. 2, proposers are required to acknowledge receipt of this information in the letter of your proposal referenced in Section III.D.1 of specification.

Roger Yang
Utility Procurement Administrator