

- What is driving SCPPA (and its members) to issue an RFP for these services at this time? **SCPPA Members (to varying degrees) understand the importance of understanding customer “wants and needs” before being able to develop or offer programs that are intended to be mutually beneficial – and to achieve that understanding Members desire the successful Respondent(s) to the RFP to provide such market research services. What are SCPPA and its members’ objectives for these market research services? Increase and/or improved understanding of trends, expectations, and desires of customers.**
- What are SCPPA and its members’ longer-term objectives related to this activity (strategic planning, customer service, customer retention, product offerings, etc.)? **All of the above ...**
- In the Table in IV(4), are we correct in assuming that the utility database referenced in the first two items would be a source of e-mail addresses for the online survey? **Correct**
- Do SCPPA and its members intend for this market research activity to be focused solely on residential customers? **No** Specifically, should respondents provide separate responses for the pricing table in IV(4) based on residential vs. business customers? **If there is a price difference between Res and Comm surveying, then, yes – distinct pricings should be provided for each sector.** If not, what mix of residential vs. business customers should be assumed? **The (small) majority (55-60%?) of surveys will probably be Residential but there will be a continued need for market insight from the Commercial Sector.**
- Does SCPPA and its members have a preference between online surveys, phone surveys, or in-person surveys? **No, cost is important – but strong participation and responsiveness is important too. So, if one survey type is less expensive but we get tepid results then the results might achieve the intended result. Survey selection will always be a “balance” – dictated by participating Member(s).**
- Are SCPPA and its members interested in proposals covering other types of market research beyond one-on-one surveys, such as public meetings? **Yes, as indicated in the RFP – please provide any additional research/survey services that you provide and believe would be beneficial to Members.**
- Are SCPPA and its members aware of any privacy laws, policies, or other constraints that might affect market research activities? **Yes, privacy concerns and laws require extreme care and handling of customer-derived data. The successful Respondent(s) to the RFP as well as participating will be required to maintain the confidentiality of the customer-specific data – but will be able to aggregate any results without providing any customer-specific attribution in publicly-available reports or documentation.**

1. What is the expected contract term? **3 years with an option for 1 additional 3-year term.**
2. What is the target completion date? **End of term**
3. Does SCPPA have a standard Consulting/Advisory Services contract it can provide that sets forth the standard or tailored legal terms and conditions under which the selected contractor would perform? **See attached** If so, will SCPPA consider any exceptions to its standard legal contract terms and conditions? **Yes, but all exceptions must be specified in your response. FYI – a few Terms/conditions are non-negotiable 1) payment terms must remain at net 60; 2) we must maintain the right to terminate w/o cause; 3) we will not grant mutual indemnity.**
4. Will SCPPA's Selection Criteria effectively reflect the Proposal Requirements set forth in Section IV (1-6) of the RFP, and will it also include all of the Section VII Additional Requirements for Proposal? **Yes**
5. How much time, calendar-wise, will SCPPA want the Contractor to reserve for Section III, Areas of Interest, Para 2, and in particular:
  - a. "Members are also interested in acquiring professional consulting services in helping develop utility-specific action plans and strategies to address, improve, and/or correct any problems or areas of dissatisfaction identified in the market research referenced directly above? and similarly to
  - b. Para 3, 4th bullet: "Translate the results in actionable plans and strategies to address, improve and/or correct problems or issues identified by the market research"? **Unknown – these additional services would best be accomplished on Time & Materials basis**
6. Will the selected Contractor have any conflicts of interest or other contractual restrictions in working with SCPPA or any of its members under separate contract(s) to assist SCPPA or its members in implementing any of the proposed findings and recommendations from the Surveys conducted? **No, such restrictions are not anticipated at this time.**
7. Will the Survey results, contacts and related information be utilized by SCPPA or its members in subsequent updated, partial or expanded survey efforts, both content and contact-wise? **Possibly, yes.**
8. Section 5: Proposal Submission it states "One (1) electronic copy of your submittal must be e-mailed no later than 4:00 pm PST on November 15, 2018, to: [bcope@scppa.org](mailto:bcope@scppa.org) with Subject/Title as: [Respondent Name] Market Research Services RFP Submittal." May we assume that this is a mistake and the due date is still November 22nd? **No, the due date has been moved to Wednesday November 21 – to avoid any conflict with Thanksgiving on the 22<sup>nd</sup>. Enjoy your Holiday!**

1. How are project sampling plans determined? **Agreed upon by the Researched and participating Member(s).** Will the research vendor have the opportunity to advise or provide a sample plan? **Yes, absolutely – Researcher input and recommendations will be critical to the selection process.**
2. How would SCPPA like us to discuss and price research tasks other than survey implementation that could vary depending on the individual research project? (i.e. reporting, sample plan development, data handling) **Unknown – but such additional details are important functions of the researcher and should be identified and explained as best as is possible within the page limitations for responses.**
3. Is SCPPA interested in other types of market research services we offer beyond the surveys outlined in the pricing table? **Yes, as indicated in the RFP – please provide any additional research/survey services that you provide and believe would be beneficial to Members.**

1. Will the utilities provide us with the names, phone numbers, and email contact info for who we distribute the survey to? **Yes, typically or “almost all the time”**
2. Can you provide an approximate range of how many surveys will be conducted and the estimated “reach” (3 responses required) for each of these surveys expected for each utility? **Typically, surveys require at least 100 or more responses for adequate sampling**
  - a. Annual, or greater frequency? **Some Members do multiple research projects each year that can take a month or more**
  - b. Surveys are discrete events or responses can be delivered at any time customer has feedback **Discreet events**
3. Will each utility require a separate survey questionnaire or has any thought been given to preparing a single survey form to be delivered to all utilities so that answers can be benchmarked (on blind basis), or trended over time? **Members have not performed common or collaborative research to date, but that is not to suggest that it might not happen in the future**
  - a. Alternatively, there could be one survey dealing with common issues related to Southern California issues and a separate survey probing into specific issues for each separate utility. **Yes, very possibly**
4. Since the scope of any specific services is unknown, is there any specific pricing related information that is requested of RFP respondents such as published rates, or will each such specific service be separately negotiated at the time they are needed? **Each project will be scoped and priced accordingly, based upon our agreed upon compensation terms (billing rates, admin, ...)**

- Will this be one research effort, conducted by SCPPA on behalf of SCPPA member utilities, or will all member utilities be contributory in and receiving of customized insights as part of these market research services requested? **Each Member will have an ability to call on the successful Respondent to the RFP to perform periodic or ongoing Market Research, Customer Satisfaction or other such surveys and projects during the term of the Agreement.**
- Are the incremental survey completes in section IV.4.(Fees) to be priced for each SCPPA member, or in total as one identity? **The exemplary Table is to be filled out "in total, as one entity".**
- Will research insights be attributed to the individual member utility level for: operational performance, resource mix, program offerings, advanced technology implementation and customer preference monitoring, or will these insights be analyzed and reported at the higher-SCPPA level only? **Surveys/research will typically be for a single Member utility and results would be aggregated so that there is no customer attribution in any publicly available reports. However, if multiple Members embark on a Group study, results would probably need to be presented for each respective participant, as well as the aggregated results for all participants.**
- Will SCPPA and member utilities be providing contact list(s) for survey distribution, or will contact list(s) need to be purchased through a third party supplier? **Members will typically provide survey contact lists.**
- Is SCPPA looking for survey instrumentation that addresses insights from both residential and business customers? **Yes**
- Some of the SCPPA members don't have high customer bases - will the selected firm be responsible for quotas representative of each utility? **Yes, in consultation/coordination with participating Members**
- The RFP indicates that the member utility(ies) may have both water and electricity customers. Are SCPPA and the member utilities interested in surveys that primarily focus on one type of service, and/or address different perceptions among these customer types? **Primarily electric, but possibly water too.**
- Along with, or instead of, the use of the suggested survey tools, is SCPPA interested in other cost-effective customer research and feedback approaches, such as focus groups, sector-specific interviews, and trials/experiments? **Yes, as indicated in the RFP – please provide any additional research/survey services that you provide and believe would be beneficial to Members.**
- Is there a set forth budget range we should be targeting in our response? **There is no specific budget set for this by any Members or SCPPA at this time.**
- Can we assume that previous market research has been conducted by the member utilities and is available for use by the Consultant? **Yes, previous market research has been performed by another contractor. Such work could be made available to the successful Respondent(s) to this RFP, if the participating Member(s) chose to provide that information. If so, please provide a general description of that work. Each survey/research project has been different but typically focuses on the preferences, needs, and expectations of customer groups to inform the utility about the trends and issues concerning the development and implementation of new customer-focused programs.**
- Will an electronic submission of our response be found acceptable or do we also have to print and ship a hard copy as well to be in compliance to the RFP? **As specified in the RFP, only electronic submittals via e-mail are required. A hard copy is not required.**

1. Has SCCPA every completed an intercept project before? **SCPPA has not, but contractors have.**
2. Can you give us some additional information on what was done, where interviews were conducted and for what purpose? **An example is to obtain “exit interviews” from participants at a community event.**
3. If you have never done an intercept project, can you describe any more detail about the data that you might want to collect as part of an intercept. **The intent of the market research services being sought, including but not limited to an intercept process, is to acquire information related to customer desires and expectations regarding utility services and potential new programs.**

1. Does SCPPA have any guidance on assumptions related to customer segments, opt-in vs opt-out programs, inclusion of incentives etc. when filling out the proforma template for survey costs? **Residential customers will be the primary segment for the research (55-60%?) and Commercial customers the remainder. All surveys will be “optional”, not opt-in/opt-out. I don’t know of any incentives that could or would be used to offset program costs.**
2. We are looking to get a better understanding of the pricing table. Can SCPPA clarify if the requested costs are to include all costs up to the point of gathering the required survey completes? i.e. the requested costs do not include any analysis or reporting on the primary research data? **I understand and agree that the table does not offer all possible preliminary and follow-up tasks or responsibilities. We ask that you include references to the related costs ( labor rates, admin fess ...) as part of your response.**
3. Can SCPPA provide details on proposal scoring? For instance, are additional points awarded to firms/teams with diverse suppliers (for example: DVMBE)? **Additional “points” will not necessarily be awarded for DVMBE but will be considered and factored into the decision-making process**
4. Does SCPPA foresee any email system restrictions with respect to file size that may hamper our ability to submit the proposal to you? **Possibly** For instance, even in short proposals the inclusion of certain graphics could increase file size significantly. Please provide a threshold for file size, if there are any restrictions. **10 MB – but you can also provide access to a link where I can download a larger file if absolutely needed. That said, we expect all Respondents to be as economical and efficient in the preparation of submittals – for both the length and “size”.**

1. Is there an incumbent? **Yes** – How long has RKS Research been the incumbent? **6 years**
  - a. If yes, what is the company name? **RKS Research** – Why out to bid now? **Performance, Cost, Supplemental services/expertise? Procurement code & policy require that we go to competitive bid if we extend or initial 3-year contract for one additional 3-year term**
  - b. If yes, when was the last customer satisfaction research conducted (DD/MM/YY)? **Ongoing**
  - c. If no, when was the last customer satisfaction research conducted (DD/MM/YY)?
2. How many firms were invited to bid? **Open and unlimited**
3. How many are anticipated to respond/submit proposals? **Unknown, but possibly 5 or more**
4. Have any of these firms worked or currently have contracts/projects with SCPPA and/or any of your current members? **Yes – How many? 2-3**
5. Has the SCPPA conducted other research projects? **Yes**
  - a. If yes, what was the nature of the project? **Energy efficiency, Demand Response and thermal energy storage systems**
  - b. If yes, what was the outcome? **Positive, improvement to utility system operations**
  - c. If no, what is the impetus for a research project now?
6. Page 2 under *Areas of Interest* mentions “Certain SCPPA Members have expressed interest.....” –
  - a. How many of the 11 members expressed interest? **At least 6**
  - b. What is the reason for the others non-interest? **Unknown**
7. What is the collective member hypothesis for the outcome / tentative answers based on what you know and/or think is happening? **Unknown**
8. What are the specific questions you want answered? **Unknown, customer/market research will be Participating Member-specific**
9. Is this an ad-hoc/one time survey? **No, it is expected that the successful Respondent(s) to the RFP will continue to be called on to provide surveys and sampling of Members’ customers opinions, ideas, and desires.**
  - a. If yes, will each member/ municipality have its own set of questions, survey deployment and data set based on their line of business?
  - b. If no, is the goal to create an on-going voice of the customer initiative/ constant feedback loop? **Yes**
    - i. Is there an opportunity to propose a voice of the customer on-going strategy? **Yes**
10. From the list of examples on page 2 under *Areas of Interest*, what is the priority ranking (based on the most pressing member challenges and capacity to take immediate action on results)? **Varies between Members**
11. What is decision criteria for award?
  - a. What is the ranking system (based on points or percentages)? **Points – Is the points total 100? Yes, probably**
    - i. Approach/Methodology **Yes – How many points? Currently undefined -but to be determined before responses are received and reviewed**
    - ii. Experience/knowledge of market research **Yes – How many points? Currently undefined -but to be determined before responses are received and reviewed**
    - iii. Experience with utilities that provide more than one service to customers **Yes – How many points? Currently undefined -but to be determined before responses are received and reviewed**
    - iv. Supplier Diversity qualification/participation **secondarily**
    - v. Price **Yes – How many points? Currently undefined -but to be determined before responses are received and reviewed – Probably the largest consideration or determining factor**
    - vi. Project timeline **Ability to deliver timely results more than timeline**

12. Regarding page 8, #7 – Supplier Diversity paragraph, we are a Women-Owned and operated business. Does this meet the standards or is a certification required? **Yes, include a statement that you are a W-O Business in your Response**
13. The SCPPA website notes that the proposal due date has been revised to 11/21/2018, is this correct? **Yes**