SOUTHERN CALIFORNIA PUBLIC POWER AUTHORITY

QUESTIONS & ANSWERS RELATED TO
Request for Proposals
Online Rebate Processing & Energy Efficiency Platform

1. Is the possibility of only bidding on the rebate disbursement aspect of this RFP [sic]? If so, are you willing to look at a 3rd party corporate payouts provider, solely for the disbursement of rebate funds.

RESPONSE: No. This RFP is requesting proposals that include __all services__ listed under the rebate processing section under areas of interest. We are also interested in the additional services listed.

Proposals that do not include all services not listed under rebate processing services will be scored accordingly by the review team.

Proposals may include work done by a 3rd party vendor subject to the terms of the Master Agreement.

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2. We received several questions related to the quantity of services or products expected.

RESPONSE: We are unable to answer questions specific to the quantity or volume of services or products. Participation in a contract stemming from this RFP process will depend on each SCPPA Member's interest and needs, which will be included in any subsequent Task Order entered into pursuant to the Master Service Agreement between SCPPA and the vendors selected from this RFP process. (See "Work to be Provided" in Section 1 of the template Master Professional Service Agreement attached to the RFP).

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3. Under the "Rebate Processing" section on page 2, it states "Implement automated workflows for managing energy efficiency program operations, from initial customer engagement through to rebate fulfillment". In this context, does rebate fulfillment **have to** include processing of check payments, or can it include steps to notify/push to the SCPPA Member's payment processing system or department for check payment issuance?

RESPONSE: This requirement will be determined individually by each participating SCPPA Member. Some SCPPA Members may prefer this functionality, while others may not. Vendors should be prepared to support both approaches. The recommended options are as follows:

Option 1: Direct Payment Processing (Full End-to-End)
The platform is responsible for generating and issuing payments directly, including checks, ACH, prepaid cards, or other approved payment methods.

Option 2: Handoff to the Utility's Internal Payment System (Most Common)
The platform completes all approval steps, documentation, validations, and rebate calculations, and then triggers or notifies the SCPPA Member's internal payment system or finance department to issue the payment.

4. In lieu of the Five Years Experience requirement, it's stated that demonstrating financial solvency would be a requirement. Do you have examples of what can satisfy this requirement?

RESPONSE: SCPPA will consider materials provided by vendors on a case-by-case basis, but may include items such as credit rating reports, financial statements, etc.

5. Pre-Existing Intellectual Property

Section 12 of the MPSA assigns all "Work Product" and "enhancements, improvements, and derivative works" to SCPPA. For respondents offering an existing SaaS platform (rather than custom-built software), would SCPPA accept contract language that:

- Preserves the respondent's ownership of pre-existing intellectual property and core platform technology, while
- Assigning to SCPPA ownership of reports and deliverables created specifically for SCPPA/Members under the Agreement?

RESPONSE: Please include proposed language as a redline to the template Master Agreement for SCPPA's consideration when submitting proposal.

6. Related to the above (Question 5), is SCPPA open to a software-as-a-service (SaaS) licensing model where the respondent hosts and maintains the platform, rather than a work-for-hire or perpetual license arrangement?

RESPONSE: Yes

7. Section V.6.A.ii notes that respondents with fewer than five years of experience may be considered if they demonstrate organizational stability and expertise. What documentation or evidence related to company stability, financials, or expertise would SCPPA find most compelling to satisfy this provision?

RESPONSE: See response to Question 4.

8. SCPPA has received questions regarding how contract will be implemented once they are executed and timing and structure of task orders and services:

RESPONSE: Awardee(s) will enter into a Master Agreement with SCPPA that lays out the scope of

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services and costs available to any interested SCPPA Member. Each SCPPA Member at their discretion may subsequently enter into a Task Order with SCPPA and the Awardee to participate in the Master Agreement. Each Individual Task Order will be governed by the Master Agreement (including scope of work and pricing). The Task Order will include the specific services/products and costs that the Awardee will provide and bill the individual SCPPA Member. (See "Work to be Provided" in Section 1 of the template Master Professional Service Agreement attached to the RFP. A template Task Order is attached as "Exhibit C" in the template Master Professional Service Agreement.)

9. For all scope elements rebate processing, portal, energy reports, does SCPPA request a single instance with common data, reporting, program management, program design etc. or unique deployments for any Participating Member?

RESPONSE: SCPPA request unique deployments for Participating SCPPA Member consistent with the Master Services Agreement and Task Order.

10. Can SCPPA provide details on anticipated volumes of member or customer participation. If not, what guidance can be provided regarding the program volumes to facilitate your vendor assessment? E.g. respondents should provide per member pricing, volume discounts etc.

RESPONSE: With regard to program volume, see response to Question 2.

Whether a SCPPA Member participates in a SCPPA Master Agreement with an Awardee is up to the discretion of that SCPPA Member and Respondents' pricing proposals should provide pricing that is broken down in such a way that is available to all SCPPA Members.

11. Would any Participating Member utility all launch simultaneously or does the option to start a program remain open to any vendor for a duration of time? For example, could a participating member initiate their program in year 3 of the Agreement? Does this time correspond with the Terms and Conditions section 18 or is section 18 solely the proposal validity period?

RESPONSE: SCPPA Member participation may not occur simultaneously and is up to the discretion of the participating SCPPA Members to determine when they would like to enter into a Task Order. Any Master Agreement entered into as a result of this RFP Solicitation will have a term of 3 years that can be extended by 3 years. A SCPPA Member's participation during that time will be determined by the terms of any Task Order entered into by the parties. (See Sections 11(a) and (c) of template Master Professional Services Agreement attached to the RFP).

12. Are there third-party M&V requirements for program assessment. Are there any cost effectiveness metrics or thresholds that need to be considered? If so, is the vendor responsible for this measurement, the Participating Member, or SCPPA?

RESPONSE: SCPPA Members report information related to M&V in their annual SB 1037 Report.

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For this purpose, it is common for the SCPPA Member to engage an independent third party to validate energy savings and compliance with program objectives.

The vendor managing the rebate processing/operations usually supports the third-party Evaluation, Measurements, and Verification (EM&V) (e.g., by providing data, documentation, and supporting outputs) but will not be responsible for conducting the independent EM&V itself.

13. Are there specific Energy Efficiency savings goals associated with the home energy reports or online marketplace in the Other Services requested?

RESPONSE: Savings are usually evaluated as deemed or estimated impacts, and overall goals are set at the program-portfolio level, not per vendor tool. Utilities may request data analytics on participation as well as how many utility customers are completing the online audit that led to utilization of the utility's rebates.

14. Can SCPPA provide current-state workflow documentation or process maps for rebate processing and related customer engagement steps (e.g., intake, eligibility review, approval, and fulfillment) across participating Member utilities?

RESPONSE: No, it is best to provide examples of workflow as part of your RFP and examples of other utilities you have worked with to display workflow. Each Participating SCPPA Member operates its own rebate programs independently. Processes vary significantly across utilities (e.g., eligibility rules, review steps, customer channels, payment procedures, and internal departments), and SCPPA generally serves as a procurement and contracting vehicle, not as the process owner for member-utility operations.

15. Can SCPPA please provide further details on their existing system's technology stack and specific data formats to offer you the best choice of cloud platform and to facilitate system integration and data factory planning?

RESPONSE: See response to Question 14

16. Does SCPPA or its members currently utilize a Customer Information System (this may also be called a Customer Relationship Management (CRM) system for any utility services? If yes, kindly specify the system(s) and whether SCPPA intends to integrate with or transition away from it.

RESPONSE: SCPPA itself is a joint powers authority that provides joint planning, procurement, and value-added services on behalf of its municipal utilities and one irrigation district. It does not operate customer billing or customer service systems directly for end customers.

The specific platforms are managed individually by each SCPPA Member and are not standardized across SCPPA. Because each utility decides its own technology stack, there is no single SCPPA-wide

CIS or CRM.

17. Does SCPPA have a Master Services Agreement or similar for any cloud services provider such as AWS, Microsoft Azure, or other platform?

RESPONSE: SCPPA does not.

18. Can you provide additional details regarding the key problems or limitations in the current system that cannot be addressed through incremental updates?

RESPONSE: The services requested are specified in the RFP. The selected vendors will work with the participating SCPPA Members to identify specific needs through the Task Order development process.

19. Has SCPPA reviewed any platforms in the past 12 months? If so, could you share product names and learning outcomes from those sessions to ensure we align with expectations?

RESPONSE: Please see response to Question 16.

20. How many persons are using the system? What are their titles and basic roles? How many will need a supervisory dashboard view over a group of persons? Will they each need a username/password combination to access the system? Are there Board level or similarly situated persons who need access to a custom dashboard just for that level of stakeholder?

RESPONSE: This will be part of the Task Order development process with the selected vendor and SCPPA Member utility.

21. To support business rules that reduce human error in manual workflows, could you please share examples of any operations in which manual input is expected?

RESPONSE: See response to Question 16

22. Can we receive some details regarding monthly transaction volumes with regard to expected rebates to be issued, volume of any additional outbound correspondence, and reports run by staff?

RESPONSE: See response to Question 16

23. Is there a preferred implementation timeline or target go-live date?

RESPONSE: Please produce a high-level implementation timeline upon execution of the Master Professional Services Agreement.

24. Is offshore work allowed, noting that no SCPPA data can ever leave the United States? If so, can offshore work include coding/configuring the system assuming that synthetic (anonymized or computer generated) test data is used by offshore staff? If not, can roles that do not touch data, such as development of the user interface be performed by offshore team members?

RESPONSE: Proposals should be consistent with the cyber security and subcontractor provisions in the RFP. Respondents may include information about offshore work and sub-contractors to inform the RFP evaluation committee as they assess the proposal.

25. Facilitate digital customer enrollment into rebate and incentive programs with minimal manual intervention. Do you expect that each customer will have a username/password logon and personalized webpage?

RESPONSE: Webpages should be customized to SCPPA Members' specifications. Each electric customer should have their own username/password logon

26. Is there a standardized enrollment workflow SCPPA expects across all participating Members, or will the digital enrollment process need to be configurable per Member utility requirements?

RESPONSE: The digital enrollment process must be configurable per Member utility requirements.

27. Provide tools for processing and verifying rebates and incentives efficiently and accurately. Are you seeking tools for SCPPA staff, or the utility customer to verify rebates and incentives?

RESPONSE: The tools should be for SCPPA Member staff.

28. Integrate rebate and incentive workflows with utility billing systems to support real-time data synchronization and customer account management…Please provide information regarding these billing systems, and if they vary across SCPPA members, please note that as well.

RESPONSE: See response to Question 16

29. Support integration with financing options where applicable, allowing customers to access financing for eligible upgrades…Please provide what systems would satisfy the need for customer access to financing? Are these systems already in place for some or all SCPPA members?

RESPONSE: See response to Question 3

30. Support digital program enrollment processes, with integration capabilities that connect directly to program administration systems. Can you describe what functions the systems on the other end of the integrations perform, and what sorts of data do they contain?

RESPONSE: See response to Question 3 and 16

31. Deliver personalized digital home energy reports that utilize advanced market segmentation to tailor insights to customer profiles. AND

Implement proactive customer outreach strategies based on usage data and customer segmentation to increase engagement and conversion rates. We are familiar with analytics and segmentation solutions. Could you provide a summary of end goals of the segmentation, such as possibly identifying customers who could benefit from products in the digital marketplace?

RESPONSE: Customer segmentation in this context is designed to drive measurable increases in energy savings, customer engagement, and program participation by tailoring communications and recommendations to the unique needs, behaviors, and tendencies of each customer group.

32. Provide an integrated digital marketplace that enables customers to browse and purchase qualified energy-efficient products directly through the platform.

Should the platform handle payment processing and product fulfillment directly, or serve as a referral platform to qualified retailers/contractors?

RESPONSE: See response to Question 3

33. Regarding the requirement to offer virtual energy efficiency assessments through the platform (Section III.2.b), does SCPPA expect these assessments to be fully self-guided by customers (e.g., via forms, photos, or online tools), or will live video interactions with utility or contractor staff be required or preferred? Additionally, can SCPPA clarify what types of customer data inputs are expected—such as uploaded images, appliance specifications, smart meter data, or behavioral questionnaires—to generate actionable energy recommendations?

RESPONSE: The system should flexibly support both workflows, with self-guided assessments as the default and live consultation as an optional feature configurable by each SCPPA Member utility.

34. Integrate rebate and incentive workflows with utility billing systems to support real-time data synchronization. Is there an existing middleware or ESB in use across any SCPPA Members, or is the vendor expected to propose a full-stack integration approach including middleware?

RESPONSE: There is no standardized SCPPA-wide integration layer across all SCPPA Members. Some utilities may have existing middleware or API endpoints, while others rely on direct system connections, file exports, or batch processes.

35. What kind of software is already in place currently? Is this RFP intended to replace an existing system, or is this a net-new capability?

RESPONSE: For certain SCPPA Member agencies, this RFP may replace an existing system; for others, it may introduce a new system that is not currently in place.

36. Will this platform be used solely by customers, or will program implementers also use it to deliver energy-efficiency programs? If implementers will use it, how many internal users should the system be designed to support?

RESPONSE: See response to Question 16

37. To properly scope system capacity and proposal pricing, can SCPPA provide rebate application and customer enrollment volumes from the previous program year?

RESPONSE: See response to Question 16

38. What is the expected implementation timeline? Will participating SCPPA Member deployments be staggered or simultaneous?

RESPONSE: SCPPA expects a phased, staggered implementation across participating SCPPA Members.

Vendors should propose a flexible timeline, detailing base platform deployment, Member-specific onboarding, and integration milestones. Exact scheduling will be finalized collaboratively with Members post-award.

39. Which Member utilities are confirmed Participating Members for the initial contract, and which Members are potential future adopters?

RESPONSE: This program is open to all SCPPA Member utilities. It is within the discretion of each SCPPA Member utility to participate.

40. What are the top 3–5 program outcomes SCPPA will prioritize when evaluating vendors (e.g., speed of rebate fulfillment, reduced manual steps, increased participation, validated savings, customer experience metrics)?

RESPONSE: For questions related to the evaluations, please refer to Section XI.3 of the Request for Proposal.

41. Which billing and CRM systems are used across participating Members (including vendor and version), and which integration interfaces are available (API, SFTP batch, ESB, etc.)?

RESPONSE: See response to Question 16

42. Are there any existing systems we should plan to integrate with besides billing—such as marketing automation tools, call center platforms, contractor management systems, or energy modeling tools?

RESPONSE: See response to Question 16

43. For the Digital Energy Efficiency Online Platform, is SCPPA expecting a full e-commerce marketplace for qualified products, or a curated catalog that redirects customers to external retailers?

RESPONSE: See response to Question 3

44. For digital Home Energy Reports, which customer segments are highest priority (e.g., high-usage households, new movers, electrification-ready customers, income-qualified participants)?

RESPONSE: Vendors should ensure the platform can flexibly define and target all segments based upon award between each unique SCPPA Member's specific program goals.

45. Will SCPPA be amending the existing contract language or issuing a formal amendment/extension based on our questions below [Question #47] regarding the pre-existing licensing model?

RESPONSE: If the Respondent requires changes to the template Master Professional Services Agreement, those changes should be submitted as redlines to the agreement in the RFP proposal.

46. What does SCPPA prefer in terms of a pricing model for the program? Can vendors provide pricing broken out by:

a. Each participating utility

b. Each customer enrolled / per-application cost

c. Required components vs optional add-ons

If tiered pricing is acceptable, should vendors provide a "menu" structure showing per-entity or per-module pricing that SCPPA can mix and match?

RESPONSE: See response to Question 10.

47. How does SCPPA define "automated workflows"? What percentage of straight-through processing is expected versus acceptable manual intervention?

RESPONSE: See response to Question 16.