

# **Butte Choice Energy**

## **Request for Proposals**

**For**

### **Data Management and Customer Call Center Services**

Solicitation Number: 20-002

**RFP Release Date: January 28, 2020**

**Response Deadline: February 28, 2020**

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## Table of Contents

<b>Overview</b> .....	1
<b>Submissions, Questions, and Anticipated Schedule</b> .....	2
<b>Term of Agreement</b> .....	2
<b>Proposal Information, Organization, and Content</b> .....	2
<b>Bid Evaluation Criteria</b> .....	5
<b>Scope of Services</b> .....	6
Electronic Data Exchange Services.....	6
Reporting.....	6
Customer Information System.....	7
Customer Call Center .....	7
Billing Administration.....	9
Settlement Quality Meter Data .....	9
<b>RFP Requirements</b> .....	10
<b>Supplier Proprietary Information</b> .....	10
<b>Proposal Delivery</b> .....	10
<b>Appendix A: Questions Related to Data Management and Call Center Services</b> .....	11

## Overview

Butte Choice Energy (BCE) is requesting proposals for data management and customer call center services to serve retail electric customers who will participate in BCE's Community Choice Aggregation Program. BCE is currently comprised of the County of Butte and the City of Chico. The Business Plan for BCE is available online at <https://www.buttechoiceenergy.org/resources>.

On November 18, 2019, two jurisdictions joined together to form a Joint Powers Authority to provide electric retail service to customers within their jurisdictions pursuant to California's Community Choice Aggregation (CCA) statutes. BCE's service area is the geographical area of the City of Chico and unincorporated Butte County, the electric customers of which (Except for direct access customers) are currently service by Pacific Gas & Electric (PG&E). BCE's implementation objectives are to 1) provide electric generation rates that are 3-4% lower than the generation rates offered by PG&E 2) offer a default product that is between 36-40% RPS qualifying renewable content at competitive rates, 3) offer voluntary products that are 50% and 100% renewable at competitive rates for comparable PG&E products, and 4) include local/regional resources as much as possible.

It is anticipated that BCE will ramp up to full operation in one phase. This RFP is intended to fulfill the needs of all anticipated BCE accounts. Phase 1 will initiate the operations of BCE and include all residential service accounts in BCE's service area. A timeline and summary of the expected characteristics of this phase is presented below as well as a load curve for this phase.

**Exhibit 1**  
**Estimated Electric Consumption for Anticipated BCE Accounts**

BCE Demand	2021	2022	2023	2024	2025
Retail Demand	448	967	977	984	990
Losses and UFE	31	68	68	69	69
<b>TOTAL DEMAND</b>	479	1,035	1,046	1,053	1,060
<b>BCE Supply</b>					
Total Renewable Resources	157	368	391	482	436
Total Conventional Resources	322	668	655	571	624
<b>TOTAL SUPPLY</b>	479	1,035	1,046	1,053	1,060

Exhibit 2 Butte Choice Energy	
	Eligible Accounts
Residential	91,582
Small Commercial	9,671
Medium Commercial	672
Large Commercial	303
Industrial	10
Street Lighting & Traffic	1,479
Agricultural & Pumping	1,976
<b>Total</b>	<b>105,694</b>

## Submissions, Questions, and Anticipated Schedule

The RFP will be conducted in accordance with the schedule set forth below.

Release RFP	January 28, 2020
Deadline for Question Submittal	February 12, 2020
Responses posted to website	February 19, 2020
Proposal Submission Deadline	February 28, 2020
Finalist Selection/Interviews	February 29-March 9, 2020
Finalize Staff Recommendations	March 9, 2020
Award of Contract and Notification	March 13, 2020
Contract Completion/Commence Work	April 1, 2020

## Term of Agreement

The anticipated duration of the agreement will be thirty-six (36) months. The term of agreement shall begin on/around April 1, 2020.

## Proposal Information, Organization, and Content

If awarded, the bidder's proposal in response to this RFP will be incorporated into a final agreement between BCE and the selected contractor. All Proposals shall contain, at a minimum, the following information:

1. Cover Letter

The cover letter should be brief (two pages maximum) and provide a short synopsis of the Proposer's approach to completing tasks and delivering project products and services. Describe how the delivery of services will be provided. If a team arrangement is proposed, BCE will recognize the integrity and validity of Proposer's team provided that:

- The arrangements are clearly identified, and relationships are fully disclosed; **and** a primary (Lead) Proposer is designated who will be responsible for all contract performance.
- The signature of the individual authorized/obligated to commit the bidder to this project is included.
- In signing proposal, statement that the bidder agrees that the terms of proposal and the costs as submitted are firm for a period of 120 days from proposal due date, unless otherwise negotiated with BCE.

The cover letter should also include

- The RFP number and title
- Name and address of proposing firms and/or individuals
- Phone and email address of sole or lead proposer
- Primary contact person

## 2. Table of Contents

This section should include clear identification of the materials by section and. Page numbers.

## 3. Bidder's Capabilities

All Proposals must provide a comprehensive description of the Bidder's qualifications and capabilities applicable to the Scope of Services section of this RFP.

## 4. Scope of Services

Please refer to the Scope of Services section for detailed requirements. Bidders are encouraged to propose enhancements or procedural or technical innovations to the Scope of Services that do not materially deviate from the objectives or content of services included in this RFP. Bidder(s) shall:

- Provide a narrative, which addresses the Scope of Work, and shows understanding of the needs and requirements of BCE.
- Describe the approach to completing the tasks specified in the Scope of services. The work plan shall be of such detail to demonstrate the bidder's ability to accomplish the project objectives.
- Outline sequentially the activities that would be undertaken in completing the tasks and specify who would perform them and what the associated costs would be.

- Furnish a project schedule for completing the tasks in terms of elapsed weeks from the project commencement date.
- Identify methods that bidder(s) will use to ensure quality control as well as budget and schedule control for the project.
- Identify any special issues, problems or risks that are likely to be encountered in this project and how the bidder(s) would propose to address them.

5. Schedule

Please include a detailed schedule which lists milestones and estimated completion dates for each of the tasks.

6. Proposed Budget and Cost of Services

Please include an estimated budget and fee itemizations by year and task including travel expenses. Include all costs that may be relevant to the services proposed.

7. References

Please provide three (3) references, including names and contact information, for which you have performed similar work. References should not include any BCE member agencies, interim staff or Board members.

8. Project Team Staffing

Please include biographies and relevant experience of key staff and management personnel who would be assigned to the project.

9. Company Overview

Please provide the following for your company:

- Official registered name, address, main telephone number, and toll-free number(s).
- Primary key contact name, title, address (if different from above address), direct telephone number(s).
- Brief history, including year established, relevant financial information, and relevant experience with CCAs.
- The proposer or any guarantor must provide the following: (1) Audited financial statements from the prior two years of operations, (2) A credit rating from two of the following: Standard & Poors, Moody's, or Fitch Investor Services from the most recent rating agency report.

10. Statement of No Conflict/Anti-Trust

Please provide a statement that describes how bidder(s) will adhere to anti-trust and collusion laws while providing service to BCE. Also provide a statement that confirms that bidder(s) and any subconsultants responding to this RFP shall avoid organizational conflicts of interest which would restrict full and open competition in this procurement and subsequent procurements. An organizational conflict of interest means that due to other activities, business units, relationships or contracts that bidder(s) would be unable, or potentially unable, to render impartial assistance or advice to BCE consistent with the requirements of California Government Code section 1090; or that a bidder’s objectivity in performing the work identified in the Scope of services is or might otherwise be impaired; or bidders have an unfair competitive advantage.

## Bid Evaluation Criteria

BCE reserves the right to consider other factors than those specified above and to request additional information from suppliers. Through issuance of this RFP, BCE makes no commitment to any supplier that it will be awarded a contract to provide the solicited services. BCE reserves the right to discontinue this RFP process at any time for any reason. Proposals that fail to meet the RFP requirements may be rejected; however, BCE may waive minor irregularities in proposals if so doing would be in the best interest of BCE. BCE reserves the right to request additional information from any/all respondents as part of the selection process.

Proposals will be evaluated based on the following non-exhaustive factors and will be scored using a 100-point maximum.

<b>Evaluation Criteria</b>	<b>Points Possible</b>
Contractor Capability and Experience	25
Management, Personnel and Qualifications	25
References	25
Cost to BCE: Clarity and cost for pre-launch and post-launch services	25

As reflected in the evaluation criteria, contract award will not be based solely on cost, but on a combination of factors as determined to be in the best interest of BCE. After evaluating the proposals and any oral interviews, BCE reserves the right to further negotiate the proposed work and/or method and amount of compensation.

Any award of a contract resulting from this RFP will be based upon the most responsive Proposal whose offer will be the most advantageous to BCE in terms of cost, functionality, effectiveness in meeting goals and objectives, and other factors as specified elsewhere in this RFP, as determined solely by BCE decision makers. BCE reserves the right to:

1. Disqualify any and all Proposals that are not submitted in accordance with the required format described in this RFP
2. Reject any and all Proposals submitted

3. Request additional information
4. Issue Addenda to this RFP
5. Award all, part, or none of the work contemplated in this RFP
6. Remedy errors in the RFP
7. Cancel the entire RFP
8. Issue a subsequent RFP
9. Approve or reject the use of a particular subcontractor/supplier
10. Negotiate with any, all or none of the Proposers. If BCE is unable to negotiate a final contract
11. Terms and Conditions that are acceptable to BCE, BCE reserves the right to award the contract to another Proposer
12. Accept other than the lowest priced Proposal
13. Award a contract without interviews, discussions or negotiations

## Scope of Services

Respondents to this RFP should bid on all components of the RFP BCE welcomes bids from both single service providers and teams of providers. A total bid price for all noted services below is requested.

BCE seeks proposals for data manager and call center services to support BCE's customer enrollment, billing, and call center activities. A list of the requested services follows.

## Electronic Data Exchange Services

- Receive and process CCA service requests (CCASRs) from PG&E which specify the changes to a BCE customer's account status such as a rate class change or opening/closing of an account.
- Obtain customer usage data from the PG&E's server, including hourly interval usage data at billing level quality.
- Communicate and store the amount to be billed by PG&E for services provided by BCE.
- Receive and store payment transactions toward BCE charges from PG&E after payment is received by the PG&E from customers.

## Reporting

Prepare reports for BCE including the following:

- Submit a monthly generation extract file to Western Renewable Energy Generation Information System (WREGIS) on BCE's behalf.
- Daily and monthly report of billing information (usage, amount, customer information, etc.) and payment transactions received.
- Weekly report of delinquent accounts, exceptions (usage delayed, usage received but unbilled, usage gaps, etc.), and accounts added and dropped.
- Monthly report of billing errors, billing timeliness, customer call center inquiries received, average time required to respond to the inquiry, and percentage of issues resolved.
- Other reports as may be proposed by the service provider.

## Customer Information System

- Establish an operational customer relationship management system within 30 days of contract execution, and establish an operational customer information system within 60 days of contract execution.
- Allow BCE to have functional access to the online database to add customer interactions and other account notes, to view customer email or written letter correspondence within online database, or view PG&E bills for BCE customers.
- Maintain a customer database of all BCE customers and identify each customer's enrollment status, rate tariff election, payment history, collection status, on-site generating capacity, if applicable, and any correspondence with the customer.
- Maintain and provide as-needed historical usage data on all customers for up to five years.
- Maintain accessible archives of billing records for all BCE customers from the start of BCE Service or a period of no less than five years.
- Maintain and communicate as needed record of customers who have been offered service with BCE but have elected to opt out, either before or after starting service with BCE.
- Maintain and communicate as needed records of net energy metering credits and generation data for customers to be posted on bill and settled at least annually.
- Store historical SmartMeter usage data, as received by the MDMA, for a 48-hour window.
- When requested by BCE, place program charges on the relevant customer account, identified by Service Agreement ID (SAID).
- Identify customers participating in various BCE programs in database.
- Include various program payment information in all relevant reports. Perform quarterly BCE program reviews to assess appropriate customer charge level.
- Maintain all customer data according to BCE's customer privacy policy and the requirements of relevant California Public Utilities Commission Decisions including D.12-08-045, including a daily backup process.
- Maintain a data management provider security breach policy.

## Customer Call Center

- Provide professional Interactive Voice Response (IVR) recordings for CCA customer call center.
- Provide option for IVR self-service and track how many customers start and complete self-service options without live-agent assistance.
- Staff a call center, during any CCA statutory enrollment period, 24 hours a day 7 days a week to process opt out requests.
- Staff a call center during Non-Enrollment Period between the hours of 8 AM and 5 PM PPT Monday through Friday, excluding BCE and PG&E holidays.
- Provide sufficient call center staffing to meet the requirements set forth herein, including designating BCE specific agents to the extent needed to provide for full functionality and a call center supervisor that will serve as the main point of contact between BCE and the customer call center staff.
- Provide sufficient number of data manager experts available to manage escalated calls between the hours of 8 AM and 5 PM PPT Monday through Friday, excluding BCE and PG&E holidays ("Regular Business Hours").
- Adhere to the following performance standards during non-enrollment periods:
- A minimum of 75% of all calls will be answered within 20 seconds.

- A minimum of 98% of all calls will be answered within 3 minutes.
- 100% of voicemail messages answered within one (1) business day.
- 100% of emails receive an immediate automated acknowledgement.
- 95% of emails receive a customized response within one (1) business day.
- 100% of emails receive a customized response within three (3) business days.
- Achieve a no greater than 5% abandon rate for all calls.
- Adhere to the following performance standards during Enrollment Periods:
  - A minimum of 75% of all calls will be answered within 60 seconds.
  - A minimum of 95% of all calls will be answered within 3 minutes.
  - 100% of voicemail messages answered within one (1) business day. iv. 100% of emails receive an immediate automated acknowledgement.
  - 95% of emails receive a customized response within one (1) business day. vi. 100% of emails receive a customized response within three (3) business days. vii. Achieve a no greater than 10% abandon rate for all calls.
- Provide monthly reports that demonstrate whether performance standards have been met.
- Provide callers with the estimated hold time, if applicable. Provide an automated 'call back' option for callers who will be put on hold for an estimated five minutes or longer.
- Record all inbound calls and make recordings available to BCE staff upon request. Maintain an archive of such recorded calls for a minimum period of 24 months.
- Track call center contact quality with criteria including:
  - Use of appropriate greetings and other call center scripts
  - Courtesy and professionalism
  - Capturing key customer data
  - Providing customers with correct and relevant information
  - First-contact resolution
  - Accuracy in data entry and call coding
  - Grammar and spelling in text communication (email and chat)
- Evaluate customer satisfaction through voluntary customer surveys that ask general questions about call quality, call resolution, and how satisfied the customer was with the service received.
- Respond to customer inquiries received through email, fax, or web-portal. Receive calls from BCE customers referred to provider by PG&E and receive calls from BCE customers choosing to contact provider directly without referral from PG&E.
- Provide the call center number on PG&E invoice allowing BCEA customers to contact the call center. Collect and/or confirm current email, mailing address and phone number of customers and add to or update database during inbound call.
- Collect permission (via voice recording, email request, or electronic form submittal) from customers to send electronic correspondence instead of printed mail.
- Respond to telephone inquiries from BCE customers using a script developed and updated quarterly by BCE. For questions not addressed within the script, refer inquiries either back to PG&E or to BCE.
- Respond to customer inquiries within 24 hours, excluding weekends and holidays, including inquiries received either through telephone calls, email, fax or web-portal.
- Offer bi-annual cross training to PG&E call center in coordination with BCE.
- Participate in coordination meetings, at BCE request, to promote the resolution of any customer service issues. Such meetings may include BCE management/ staff and may require on-site participation by Provider's management/staff.

- Ensure monthly status reports are provided during the first week of each month.
- Provide weekly status reports during statutory enrollment periods.
- Use commercially reasonable efforts to make Spanish speaking call center staff available to customers during regular business hours.
- Provide translation services for inbound calls for at least the following languages: Spanish, Mandarin, Tagalog, and Vietnamese.
- Create and maintain online and downloadable forms for the BCE website so that customers may perform program related tasks including but not limited to changing their account status to enroll or opt out of various BCE programs. These program changes will be integrated into the customer relationship management system during an hourly sync process
- Host BCE meetings with call center management and representatives on a bimonthly basis.

### Billing Administration

- Maintain a table of rate schedules, provided by BCE, and calculate bills.
- Apply PG&E account usage against applicable BCE rates.
- Review application of BCE rates to PG&E accounts to ensure that the proper rates are applied to the accounts.
- Provide timely billing information to the PG&E to meet the PG&E's billing window.
- Use commercially reasonable efforts to remedy billing errors in a timely manner, within no more than one billing cycle.
- Check preliminary bills from PG&E for reasonableness before the bills are sent out.
- Maintain a table of rate schedules offered by BCE to its customers.
- Send certain BCE program charges for non-BCE customers, when supported by PG&E, based on information provided to provider by BCE.
- Send certain BCE program charges as a separate line item to PG&E for placement on monthly bill during term of repayment.
- Apply PG&E account hourly interval usage data for all BCE customers against applicable rate to allow for customer billing.
- Review application of BCE rates to PG&E accounts to ensure that the proper rates are applied to the accounts.
- Timely submit billing information for each customer to PG&E to meet PG&E's billing window.
- Use commercially reasonable efforts to remedy billing errors for any customer in a timely manner, no more than one billing cycle.
- Assist with settlement process for net energy metering customers on at least an annual basis and potentially monthly by identifying eligible customers, providing accrued charges and credits, and providing mailing list to BCE designated printer.
- Provide customer mailing list to BCE designated printer for new move-in customer notices and opt out confirmation letters routinely within 7 days of enrollment or opt out.
- Send an BCE provided letter to customers that are overdue. If no payment is received from the customer after a certain amount of time, issue a CCASR to return customer to PG&E.

### Settlement Quality Meter Data

- Service provider shall provide BCE or its designated scheduling coordinator with settlement quality meter data (SQMD) as required by the CAISO.

- On BCE's request, service provider will submit SQMD directly to the CAISO on behalf of BCE or its designated scheduling coordinator.

## RFP Requirements

All service providers must include the following information:

1. Proposals must include a description of the proposed invoicing process for the service provider to BCE. BCE is requesting proposals that provide for monthly invoices to be delivered no later than the fifteenth day of the month for products/services provided during the previous calendar month.
2. All proposals must indicate the date after which the proposed prices are no longer valid and subject to re-pricing.
3. The service provider or any guarantor must provide the following: (1) Audited financial statements from the prior two years of operations, (2) If available, a credit rating from two of the following: Standard & Poors, Moody's, or Fitch Investor Services from the most recent rating agency report.
4. Attached to this RFP is Appendix A. Please respond to the questions in Appendix A and submit answers with your proposal.
5. Any questions regarding this RFP should be directed to:

Amber Nyquist  
(425) 889-2700 ext 216  
[nyquist@eesconsulting.com](mailto:nyquist@eesconsulting.com)

## Supplier Proprietary Information

Information submitted in response to this RFP will be used by the County or its designated representatives, including consultants, solely for the purpose of evaluating this RFP. Proprietary data should be specifically identified on every applicable page of the service provider's submittal; service providers should mark or stamp applicable pages as "Confidential" or "Proprietary." Reasonable care will be exercised so that information clearly marked as proprietary or confidential will be kept confidential, except as required by law or regulatory authority. The County and its employees and consultants will not be liable for the accidental disclosure of such data, even if it is marked.

## Proposal Delivery

Responses to this RFP must be received electronically by 5:00 p.m. Pacific Time on February 28, 2020.

Amber Nyquist  
[nyquist@eesconsulting.com](mailto:nyquist@eesconsulting.com)

## Appendix A: Questions Related to Data Management and Call Center Services

### Data Management

- 1) Has your firm previously received large volumes of energy use data from an investor owned utility (IOU), applied CCA rates, and returned CCA billing data to that IOU? If yes, which IOU(s)?
- 2) For how many customer accounts did your firm provide this service?
- 3) Has your firm reported aggregated customer load to an independent system operator (ISO) for settlement purposes (Settlement Quality Meter Data)? If yes, which ISO?
- 4) Has your firm served as a qualified report entity (QRE) for small-scale renewable energy generators and reported net production to a renewable energy registry such as the Western Renewable Energy Generation Information System (WREGIS)? If so, which registry?
- 5) Where are the offices that will handle BCE's data management needs?
- 6) How many staff will serve BCE's data management needs full time? Part time?

### Call Center

- 7) Where is the call center(s) that will serve BCE customers?
- 8) Does your firm own and operate these call centers or are they outsourced?
- 9) How many call center employees will serve BCE customers full-time during start-up? During normal operations?
- 10) How many will be partially assigned to serving BCE customers during start-up? During normal operations?

### Staffing and Scale Up

- 11) How many new CCA or DA customer accounts will your firm begin serving over the next year?
- 12) How will your organization scale-up to accommodate the increased workload associated with the above-mentioned accounts as well as BCE?
- 13) How many additional staff will your organization hire to handle BCE's needs?
- 14) What staff member will BCE managers reach out to for advice, or with questions and concerns?

### Pricing and Terms

- 15) Please provide a total "all in" price for the above-mentioned data management and call center services for the duration of the proposed 36-month agreement.
- 16) Are there any other charges associated with your data management services?
- 17) If the number of anticipated customers increases by 100,000, will your pricing remain the same?

### Other

- 18) Are there any other data management or call center services that will be needed to service BCE customers that are not addressed in the scope of services for this RFP?