



**REQUEST FOR PROPOSALS (RFP)  
FOR  
CLEAN POWER ALLIANCE (CPA)  
PRINTING AND MAILING SERVICES  
Addendum #1**

**I. OBJECTIVE**

Clean Power Alliance of Southern California (“CPA”) is seeking proposals from qualified and experienced contractors (“Proposer”) to provide printing and mailing services for CPA. CPA intends to award either a contract to one Proposer for both printing and mailing or a contract to two Proposers for printing and mailing services separately.

**II. PROJECT BACKGROUND**

CPA is a Community Choice Aggregation (“CCA”) program, established as a Joint Powers Authority, made up of 32 local agencies across Los Angeles and Ventura Counties. These agencies have banded together to provide cleaner electricity at competitive rates, offering a choice of electricity service providers to approximately three million residents and businesses through approximately one million customer accounts in Southern California.

CPA sends several types of notices to customers throughout the year some of which require printing and mailing services.

Below are details of these notices:

*Move-in Mailers:*

CPA sends two mailed notices to every new customer in our service area. The first notice arrives within 30 days of the start of their electricity service and the second notice arrives between 30 and 60 days after the start of their electricity service. CPA has three different levels of service and has a different move-in notice for each service level. CPA currently prints enough mailers for about three months of each service level at once. The three months of inventory is delivered by the printer to the mailing vendor. The mailer then mails out three batches every week (one batch for every service level). The weekly amount is approximately 5,000 notices (see Attachment H for examples).

*Compliance Mailers:*

Twice a year, CPA must send compliance notices to all customers about our energy content and rates (the Joint Rate Comparison Mailer and the Power Content Label). We intend to send emails to as many customers as possible, and then send mailed notices

to the remainder, which is approximately 500,000 customers. The Joint Rate Comparison Mailer will go out in June 2022. Four different versions of this mailer are sent to different customer groups in the following approximate sizes: 100,000, 20,000, 60,000, and 320,000. The Power Content Label will go out in September 2022. Only one version of this mailer is sent to approximately 500,000 customers. The Joint Rate Comparison Mailer typically goes out in June of every calendar year and the Power Content Label typically goes out in September of every calendar year (see Attachment H for examples).

*Other Notices:*

Additionally, two to three times a year CPA sends notices to customers for various programs or account changes. CPA expects to send approximately 60,000 notices between September 2021 and November 2021 to inform customers of a default change (likely four different notices). And approximately 50,000 notices in April 2022 to inform solar customers if they will receive a cash out (most likely there will be four different letters) (see Attachment H for examples).

*Enrollment Notices:*

In the future, CPA may enroll new cities or counties. During periods of enrollment, all eligible electricity customers receive four notices: one between 60 and 30 days before service starts, one in the 30 days before service starts, one in the 30 days after service starts, and one between 30 and 60 days after service starts. The number of eligible customers depends on the city or county but could be up to 60,000 or more. Ineligible program letters may also need to be sent; quantities will vary.

*Other Outreach and Marketing:*

CPA may also conduct other forms of customer outreach and marketing that require the assistance of a printing and mailing service provider (see Attachment H for an example page from CPA's Annual Impact Report).

### **III. QUALIFICATIONS AND EXPERIENCE**

A qualified Proposer ~~should have~~ **must be able to affirm** the following minimum qualifications and experience:

- Ability to print and/or complete mail jobs of ~~8600,000+~~ pieces over a four-week period.
- Ability to receive mailing lists from CPA's data management vendor in tilde delimited txt format sent via SFTP. Our data management vendor or the mailing vendor can host SFTP (applicable to mailing vendor only).
- Affirm ability and willingness to execute a Non-Disclosure Agreement, to adhere to policies that protect customer data privacy, and to sign acknowledgments complying with such policies as they may be amended from time to time.
- For mailing services only, ~~be able to~~ **must** use CPA's mailing permit for Business Mail Entry Unit 7001 S Central Ave RM 210, Los Angeles CA 90052-9614 or **must** propose use of ~~your own~~ **Proposer's** mailing permit that lists an area in CPA's service territory

on the indicia. CPA will not ~~consider using~~ allow the use of an indicia without a city, county, or zip code listed or an indicia that lists ~~an area~~ a city, county, or zip code outside of CPA’s service territory.

- Availability to complete critical print and/or mailing jobs in accordance with the following expected term:

<b>Expected Quantity</b>	<b>Expected Term</b>
5,000 customer notifications mailed/week. Printed in batched approximately every three months.	Throughout the year
500,000 customer notifications printed in a maximum of one month and mailed over a maximum of two weeks.	To be mailed in <u>June and</u> September 2022. In any subsequent years June and September of every calendar year.
60,000 customer notifications printed in a maximum of two weeks and mailed over a maximum of two weeks.	To be mailed in September 2021, and November 2021 and in September and November of any subsequent calendar years, but the mailer amounts may vary.
50,000 customer letters printed in a maximum of two weeks and mailed over a maximum of two weeks.	To be mailed in April every year.

Examples of these four categories of mailers (which correspond to the 4 projects in Section V) are provided in Attachment H to this addendum.

Please note that these are examples. The size and format of CPA’s requests may vary from time to time.

Preferred:

- Experience working with a CCA or a local government agency on customer notifications. Proposers are expected to identify the entities for which they have provided services.

**Pursuant to Proposition 209, Clean Power Alliance does not give preferential treatment based on race, sex, color, ethnicity, or national origin. However, Clean Power Alliance encourages minority-owned, women-owned, veteran-owned, and local businesses to respond to solicitations.**

#### **IV. SCOPE OF SERVICES**

##### **A. Scope of Work**

A detailed description of the Scope of Work for print and mail services as needed is contained in **Attachment A** (“Contemplated Scope of Services”).

##### **B. Term of Work**

Services under this RFP are expected to commence on September 3, 2021 and continue

until September 3, 2022 (“Initial Term”). At the end of the Initial Term, the Parties may renew this Agreement for successive one (1) year terms for a maximum of two additional years (each, a “Renewal Term”) for a total of 3 years.

**V. PRICING**

Proposer must include estimate costs for the following example projects in the table below. Proposers may submit proposals for Printing only, Mailing only, or for both. This form is Attachment J to the RFP.

Please complete the below table as part of your response. In the pricing table, please specify the paper weight(s) used. They should fall within the provided ranges.

Project	Format	Paper	Anticipated Quantities	Estimated Cost for Printing	Estimated Cost for Mailing
1	<ul style="list-style-type: none"> <li>• Full color</li> <li>• Double-sided postcard</li> <li>• 6 x 10.5</li> <li>• Printed address</li> </ul> <i>30,000 printed at once, but three batches addressed and mailed weekly to new move-in customers approximately 5,000/week.</i>	30% recycled 100-130lb Silk cover	30,000		
		10% recycled 100-130lbsilk cover			
		100% recycled 100-130lb silk cover			
2	<ul style="list-style-type: none"> <li>• Full color</li> <li>• Single page one-sided letter</li> <li>• 8.5 x 11</li> <li>• Regular #10 envelope with printed address (please specify recycle content % used for quote)</li> </ul>	30% recycled 24 - 60 lb.	50,000		
		10% recycled 24 – 60 lb.			
		100% recycled 24 – 60 lb.			
3	<ul style="list-style-type: none"> <li>• Full color</li> <li>• Double-sided postcard</li> <li>• 6 x 10.5Printed address</li> </ul> <i>500,000 must be printed within one month.</i>	30% recycled 100-130lb.silk cover	500,000		
		10% recycled 100-130lb silk cover			
		100% recycled 100-130lb silk cover			
4	<ul style="list-style-type: none"> <li>• Full color</li> <li>• double-sided postcard</li> <li>• 6 x 10.5Printed address</li> </ul>	30% recycled 100-130lb silk cover	60,000		
		10% recycled 100-130lb silk cover			
		100% recycled 100-130lb silk cover			
5	Pricing to produce one National Change of Address (NCOA) report. CPA expects to request NCOA reports up to 5 times per				

	calendar year. If discounts are available for a larger volumes of reports, please describe the discount.				
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Postage should not be included in the mailing price.

**VI. RFP Process**

**A. RFP Schedule**

The timetable for this RFP is as follows:

Description	Date
Release of RFP	June 30, 2021
Prospective Proposers' Webinar	July 7, 2021
Deadline for Written Questions	July 9, 2021 by 4:00 p.m.
Responses to Questions Provided	Friday, July 16,
<b>RFP Proposals Due</b>	<b>July 23, 2021 by 4:00 p.m.</b>
Evaluation of Proposals	July 26-August 6, 2021
Interviews (if needed)	August 9-13, 2021
Contract Negotiations	August 16-19, 2021
Presented to the Board for Approval and-or Execution of Contract	September 2, 2021
Commencement of Work	No later than September 3, 2021

**B. Prospective Proposers' Webinar**

A Proposers' webinar will be held on Wednesday July 7, 2021, from 3PM to 4PM (Pacific Time). Please use the link below to register for the webinar. After registering, you will receive a confirmation email containing information about joining the webinar. At the time of the webinar, please use the same link to join the webinar. A transcript of the webinar will be posted on the CPA website within 48 hours of the conclusion of the webinar.

Webinar Registration Link:

<https://zoom.us/meeting/register/tJlpcu2tqjMtGNCSVGupW9EUH1kkaVMIDI9P8>

### C. Proposer Questions and CPA Responses

Potential proposers may submit questions regarding this RFP by sending an email to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) with a copy to [ahang@cleanpoweralliance.org](mailto:ahang@cleanpoweralliance.org). All questions must be received by 4:00pm (pacific time) on July 9, 2021. When submitting questions, please specify which section of the RFP you are referencing and quote the language that prompted the question. CPA will post responses to all of the questions received for this solicitation to CPA's website at: <https://cleanpoweralliance.org/get-involved/job-contracting-opportunities/> on Friday, July 16.

CPA reserves the right to group similar questions when providing answers. Questions may address issues or concerns that the evaluation criteria and/or business requirements would unfairly disadvantage providers or, due to unclear instructions, may result in CPA not receiving the best possible responses from provider.

### D. Proposal Submission Deadline

The proposal should be submitted by email to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) by **4:00 p.m. on July 23, 2021**. Please see Section VII for Proposal Requirements. ~~Proposals will not be considered unless they include:-~~

- ~~• Proposer's qualifications and experience with the elements specified in Section III (Qualifications and Experience). See RFP section III.~~
- ~~• Completed affirmation of proposer's ability to meet the Scope of Services. See Attachment I)~~
- ~~• Completed pricing form. See RFP section V.~~
- ~~• Proposer's completed Prospective Contractor References Form. See Attachment B.~~

It is the sole responsibility of the submitting Proposer to ensure that its proposal is received before the submission deadline. Submitting Proposer shall bear all risks associated with delays in delivery. Any proposals received after the scheduled closing date and time for receipt of proposals may not be accepted.

Please include "PROPOSAL FOR PRINT AND MAILING SERVICES" in the email subject line. Failure to include this text in the subject line may result in the proposal not being considered during the evaluation process.

### E. Proposal Evaluation Criteria

Proposals will be evaluated in accordance with the following evaluation criteria.

<b>Evaluation Criteria</b>
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Proposer’s qualifications and experience (see Section III).
Proposer’s ability to provide the Contemplated Scope of Services identified in <b>Attachment A</b> .
Proposer’s Pricing (see Section V)

**F. Evaluation Process**

CPA will evaluate the proposals pursuant to the criteria specified, in Section VI.D., above. CPA may select one Proposer or select a combination of Proposers (with or without interviews). CPA may split the work or services in any manner that CPA may determine, in its sole discretion, offers CPA the best value. CPA may conduct interviews with a “short list” of Proposers, consisting of those Proposers reasonably likely, in CPA’s sole discretion, to be awarded the contract. Any interview may include discussions about services offered, conflict of interests with other clients, or fees/compensation amount or structure. Interviews may take place through written correspondence, and/or telephone or video conference interviews, at CPA’s sole discretion.

CPA reserves the right not to “short list” proposers or to convene interviews or discussions. CPA further reserves the right to make an award on the basis of initial proposals received. References may be contacted at any point in the evaluation process.

CPA may decide to negotiate with one or more Proposer(s). After one or more Proposer(s) has been selected, CPA will negotiate a contract for execution. If a satisfactory contract cannot be negotiated, CPA may, at its sole discretion, begin contract negotiations with the next qualified Proposer(s) who submitted a proposal, as determined by CPA. Proposers are further notified that CPA may disqualify any Proposer with whom CPA cannot satisfactorily negotiate a contract. A contract may be presented to CPA’s Board of Directors for approval.

**VII. PROPOSAL REQUIREMENTS**

Proposals shall include the following components ~~and should not exceed 20 pages:~~

~~• Proposer’s qualifications and experience with the elements specified in Section III (Qualifications and Experience).~~

1. **Completed Attachment I.** Proposer should affirm its ability to meet the qualifications and experience specified in Section III and the Scope of Services specified in **Attachment A** (which will be attached to the final agreement as Exhibit A) by completing **Attachment I**.

2. **Completed Attachment J.** Proposer must provide its pricing proposal, including the information required in Section V., “Pricing,” above. Proposer should describe any fixed fees or hourly billing rates, fees, or other compensation that Proposer may seek from CPA for services, inclusive of staff

time, equipment, materials, travel, administrative/clerical, overhead and other out-of-pocket expenses, if applicable to this contract.

**3. Completed Attachment B.** Proposer's completed Prospective Contractor References Form. See **Attachment B**.

**4.** Any required changes to CPA's Pro Forma Contract. If no changes are required, a CPA Pro Forma does not need to be submitted. See **Attachment D**.

Please be aware that any successful vendor(s) will be required to complete the Campaign Contribution Form (Government Code 84308), Attachment E at the start of any contract negotiations.

### **VIII. RESERVATION OF RIGHTS**

This RFP is a solicitation for proposals only and is not intended as an offer to enter into a contract or as a promise to engage in any formal competitive bidding or negotiations. CPA may, at its sole discretion, accept or reject any or all proposals submitted in response to this RFP. CPA also may, in its sole discretion, make no award for this RFP or cancel this RFP in its entirety. In addition, CPA may, at its sole discretion, only elect to proceed with contract negotiations for some of the services included in the proposal. CPA further reserves its right to waive minor errors and omissions in proposals, request additional information or revisions to offers, and to negotiate with any or all Proposers.

CPA shall not be liable for any costs incurred by the Proposer in connection with the preparation and submission of any proposal. CPA reserves the right to waive inconsequential disparities in a submitted proposal. CPA has the right to amend the RFP, in whole or in part, by written addendum, at any time. CPA is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda. Such addendum shall be made available to each person or organization which CPA records indicate has received this RFP. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the proposal being found non-responsive and not being considered, as determined in the sole discretion of CPA. CPA is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf. CPA has the right to reissue the RFP at a future date.

### **IX. CONFIDENTIALITY AND PUBLIC RECORDS**

Responses to this RFP shall become the exclusive property of CPA. CPA is subject to the California Public Records Act ("CPRA"). The recommended Proposer's proposal will become a matter of public record when contract negotiations are complete and when an



agreement is executed by CPA. Exceptions to disclosure may be available to those parts or portions of proposals that are justifiably and reasonably defined as business or trade secrets, and plainly marked by the Proposer as "Trade Secret", "Confidential", or "Proprietary". CPA shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the CPRA or otherwise by law.

**In the event CPA receives a CPRA request for any of the aforementioned documents, information, books, records, and/or contents of a proposal marked "Confidential", "Trade Secrets", or "Proprietary", Proposer agrees to defend and indemnify CPA from all costs and expenses, including reasonable attorneys' fees, incurred in connection with any action, proceedings, or liability arising in connection with the CPRA request.**

A blanket statement of confidentiality or the marking of each page of the proposal as confidential shall not be deemed sufficient notice of a CPRA exemption, and a Proposer who indiscriminately and without justification identifies most or all of its proposal as exempt from disclosure or submits a redacted copy may be deemed non-responsive.

#### **X. CONFLICTS OF INTEREST**

CPA is governed by the Political Reform Act, Government Code Section 1090, Government Code Section 84308, and other requirements governing conflicts, campaign contributions, and gifts. Proposers are required to review all applicable conflict of interest laws. In addition, CPA has adopted policies governing bidder conduct. Proposers are advised to review all policies, including the Vendor Communication Policy available here: <https://cleanpoweralliance.org/key-documents/>.

You may not contact or receive information outside of this RFP process. If it is discovered that the Proposer contacted and received information from anyone other than the email address specified above and under the process specified herein regarding this solicitation, CPA may, in its sole discretion, disqualify your proposal from further consideration.

All contact regarding this RFP or any matter relating thereto must be in writing and may be emailed to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org).

#### **ATTACHMENTS**

**Attachment A** – Scope of Services

**Attachment B** – Prospective Contractor References

**Attachment C** – CPA Member Agencies

**Attachment D** – CPA Sample Contract

**Attachment E** – Campaign Contribution Form (Government Code 84308)

**Attachment F** – Order Form

**Attachment G** – (1) Pro Forma Non-Disclosure Agreement, (2) CPA Privacy and Customer Confidentiality Policy and Acknowledgment, and (3) CPA Protection of Confidential Information Policy and Acknowledgment

**Attachment H** – Example Mailers

**Attachment I** – Affirmation of Ability to meet the Qualifications and Experience and the Scope of Services

**Attachment J – Pricing Form**

## **ATTACHMENT A SCOPE OF SERVICES**

The principal responsibility of the selected Proposer(s) is to provide print and/or mailings services that include, but are not limited to, the following:

### **I. Printing Services, including but not limited to:**

- a. Print up to 200,000 pieces per weekly batch.
- b. Print in formats including letters, postcards, bifold, or others, as CPA may determine from time to time.
- c. Sourcing and printing on a percentage recycled paper, as decided by CPA or as revised by CPA from time to time.

#### Deliverables:

- a. Printing must be completed within the time specified in the Order Form (**Attachment F**).
- b. Vendor should submit a proof of each notice to CPA within 3 business days, if not sooner, for CPA review and approval.

### **II. Mailing Services, including but not limited to:**

- a. Review and provide a report of National Change of Address.
- b. Mail notices, either via bulk and standard mailing, as directed by CPA or as revised from time to time.
- c. Sign non-disclosure agreements for handling sensitive customer data, sign acknowledgments of CPA's privacy and confidentiality policies, renew such acknowledgments, if amended from time to time (see **Attachment G**).
- d. For mailing services only, must use CPA's mailing permit for Business Mail Entry Unit 7001 S Central Ave RM 210, Los Angeles CA 90052-9614 or must propose use of Proposer's mailing permit that lists an area in CPA's service territory on the indicia. CPA will not allow the use of an indicia without a city, county, or zip code listed or an indicia that lists a city, county, or zip code outside of CPA's service territory.

#### Deliverables:

- a. Report of National Change of Address must be provided upon request.
- b. Confirmation that the notices have been mailed must be sent to CPA within 1 business day of the mailing.
- c. NDAs and acknowledgments must be executed at the time of contract execution.
- d. Mail all move-in mailers within one week of receipt of the weekly mailing lists provided by CPA or its designee.

### **III. Tracking and Reporting of Progress and Costs, including but not limited to:**

- a. Track and report on progress of projects from initial proof through delivery to post office.

- b. Track and report on printing costs and postage monthly with itemized breakdown.

Deliverables:

- a. Report of progress of projects must be provided within 1 business day of request.
- b. Report on printing costs and postage must be provided on a monthly basis.

**IV. Other ad hoc printing and mailing of program collateral, including but not limited to:**

- a. Printing and mailing of other notices, including but not limited to CPA program collateral.

Deliverables:

- a. Report of progress of projects must be provided within 1 business day of request.
- b. Vendor will be expected to submit a proof of each notice to CPA within 3 business days, if not sooner.

The individual projects will be authorized through a separate order form prepared by CPA, based on its discretion, prior to the start of work (see **Attachment F**). The order form will include the deadline for which such services must be completed and the compensation for such services.

**ATTACHMENT B  
PROSPECTIVE  
CONTRACTOR REFERENCES**

**Contractor's Name:** \_\_\_\_\_

List three (3) References where the same or similar scope of services were provided in order to meet the Minimum Requirements stated in this solicitation.

<b>1. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (    )	<b>Fax #</b> (    )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>2. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (    )	<b>Fax #</b> (    )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>3. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (    )	<b>Fax #</b> (    )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.

**ATTACHMENT C**  
**List of CPA MEMBER AGENCIES**

<b>County/City</b>
<b>Agoura Hills</b>
<b>Alhambra</b>
<b>Arcadia</b>
<b>Beverly Hills</b>
<b>Calabasas</b>
<b>Camarillo</b>
<b>Carson</b>
<b>Claremont</b>
<b>Culver City</b>
<b>Downey</b>
<b>Hawaiian Gardens</b>
<b>Hawthorne</b>
<b>LA County</b>
<b>Malibu</b>
<b>Manhattan Beach</b>
<b>Moorpark</b>
<b>Ojai</b>
<b>Oxnard</b>
<b>Paramount</b>
<b>Redondo Beach</b>
<b>Rolling Hills Estates</b>
<b>Santa Monica</b>
<b>Sierra Madre</b>
<b>Simi Valley</b>
<b>South Pasadena</b>
<b>Temple City</b>
<b>Thousand Oaks</b>
<b>Ventura City</b>
<b>Ventura County</b>
<b>West Hollywood</b>
<b>Westlake Village</b>
<b>Whittier</b>

**ATTACHMENT D  
SAMPLE CONTRACT**

Attached is a sample CPA Agreement that will be negotiated between the CPA and selected print and mailing services firm(s). Additional terms and conditions will be incorporated dependent on circumstances, including scope of services, the space selected, any tenant improvement or allowance, and other factors.

**Clean Power Alliance of Southern California**

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This Professional Services Agreement (this "Agreement"), dated and effective as of [Month/Day, Year] (the "Effective Date"), is made by and between:

**CLEAN POWER ALLIANCE OF SOUTHERN CALIFORNIA ("CPA"), and**

**[Legal Name of Contractor] ("Contractor").**

CPA and Contractor are sometimes collectively referred to herein as the "Parties" and each individually as a "Party." In consideration of the terms of this Agreement, and for other good and valuable consideration, the Parties make the following acknowledgments and agreements:

**RECITALS**

**WHEREAS**, CPA may contract with a provider for print and mailing services

**WHEREAS**, CPA conducted a Request for Proposals ("RFP") and CPA selected Contractor because Contractor has the expertise and experience to provide the specified services to CPA and offered CPA the Best Value;

**WHEREAS**, Contractor desires to provide these specified services to CPA;

**WHEREAS**, the purpose of this Agreement is to set forth the terms and conditions upon which Contractor shall provide services to the CPA;

**NOW, THEREFORE**, it is agreed based on the consideration set forth below by the Parties to this Agreement as follows:

**AGREEMENT**

**1. Definitions.**

- a. The definition of "Confidential Information" is set forth in paragraph 10.b. of this Agreement.
- b. "CPA Data" shall mean all data gathered or created by Contractor in the performance of the Services pursuant to this Agreement, including any customer or customer-related data.
- c. "CPA Information" shall mean all confidential, proprietary, or sensitive information provided by CPA to Contractor in connection with this Agreement.

- d. "CPA Materials" shall mean all finished or unfinished content, writing and design of materials but not limited to messaging, design, personalization, or other materials, reports, plans, studies, documents and other writings prepared by Contractor, its officers, employees and agents for CPA for the performance of, the purpose of, or in the course of implementing this Agreement.
- e. "CPA Product" includes collectively CPA Data, CPA Information, and CPA Materials.
- f. "Services" shall mean the scope of work Contractor provides to CPA as specified in Exhibit A.

## **2. Exhibits and Attachments.**

The following exhibits and attachments are attached to this Agreement and incorporated into this Agreement by this reference:

Exhibit A – Scope of Work  
Exhibit B – Contractor's Workplan and Schedule  
Exhibit C – Payments and Rates  
Exhibit D – Contractor's Bid Response

Should a conflict arise between language in the body of this Agreement and any exhibit or attachment to this Agreement, the language in the body of this Agreement controls, followed by Exhibit A, B, C, and D in that order.

## **3. Services to be Performed by Contractor.**

In consideration of the payments set forth in this Agreement and in Exhibit C, Contractor shall perform services for CPA in accordance with the terms, conditions, and specifications set forth in this Agreement and in Exhibits A and B ("Services").

## **4. Compensation.**

CPA agrees to compensate Contractor as specified in Exhibit C:

- a. In consideration of the Services provided by Contractor in accordance with all terms, conditions and specifications set forth in this Agreement and Exhibit A and Exhibit B, CPA shall make payment to Contractor based on [the time and material rates, not-to-exceed, or fixed fee] and in the manner specified in Exhibit C.
- b. Unless otherwise indicated in Exhibit C, Contractor shall invoice CPA monthly to [accountspayable@cleanpoweralliance.org](mailto:accountspayable@cleanpoweralliance.org) for all compensation related to Services performed during the previous month. Payments shall be due within fifteen (15) calendar days after the date the invoice is submitted to CPA at the specified email address. All payments must be made in U.S. dollars.

## **5. Term.**

Subject to compliance with all terms and conditions of this Agreement, the term of this Agreement shall be one (1) year from the Effective Date ("Initial Term"). At the end of the Initial Term, the Parties may renew this Agreement for successive one (1) year terms for a maximum of two years (each, a "Renewal Term"), unless either Party provides ninety (90) days prior



written notice of its intent not to renew the term of the Agreement (“Renewal Notice”)

## **6. Termination.**

- a. Termination for Convenience. CPA may terminate the Agreement in accordance with this paragraph in whole, or from time to time in part, whenever CPA determines that termination is in CPA’s best interests. A termination for convenience, in part or in whole, shall take effect by CPA delivering to Contractor, at least thirty (30) calendar days prior to the effective date of the termination or prior to a Notice of Termination specifying the extent to which performance of the Services under the Agreement is terminated.

If the termination for convenience is partial, Contractor may submit to CPA a request in writing for equitable adjustment of price or prices specified in the Agreement relating to the portion of this Agreement which is not terminated. CPA may, but shall not be required to, agree on any such equitable adjustment. Nothing contained herein shall limit the right of CPA and Contractor to agree upon amount or amounts to be paid to Contractor for completing the continued portion of the Agreement when the Agreement does not contain an established price for the continued portion. Nothing contained herein shall limit CPA’s rights and remedies at law.

- b. Termination for Default. If Contractor fails to provide in any manner the Services required under this Agreement, otherwise fails to comply with the terms of this Agreement, or violates any ordinance, regulation or law which applies to its performance herein and such default continues uncured for thirty (30) calendar days after written notice is given to Contractor, CPA may terminate this Agreement by giving five (5) business days’ written notice. If Contractor requires more than thirty (30) calendar days to cure, then CPA may, at its sole discretion, authorize additional time as may reasonably be required to effect such cure provided that Contractor diligently and continuously pursues such cure.
- c. Effect of Termination. Upon the effective date of expiration or termination of this Agreement: (i) Contractor may immediately cease providing Services in its entirety or if a termination to a part of the Agreement, those Services that have been terminated; (ii) any and all payment obligations of CPA under this Agreement will become due immediately except any equitable adjustment pursuant to Paragraph 6(a); (iii) promptly transfer title and deliver to CPA all CPA Product or any work in progress pursuant to this Agreement; and (iv) each Party will promptly either return or destroy (as directed by the other Party) all Confidential Information of the other Party in its possession as well as any other materials or information of the other Party in its possession.

Upon such expiration or termination, and upon request of CPA, Contractor shall reasonably cooperate with CPA to ensure a prompt and efficient transfer of all data, documents and other materials to CPA in a manner such as to minimize the impact of expiration or termination on CPA’s customers.

## **7. Contract Materials.**

CPA owns all right, title and interest in and to all CPA Materials and CPA Data. Upon the expiration of this Agreement, or in the event of termination, CPA Materials and all CPA Information, in whatever form and in any state of completion, shall remain the property of CPA

and shall be promptly returned to CPA. Upon termination, Contractor may make and retain a copy of such Contract Materials if required by law or pursuant to the Contractor's reasonable document retention or destruction policies.

#### **8. Payments of Permits/Licenses.**

Contractor bears responsibility to obtain any license, permit, or approval required for it to provide the Services to be performed under this Agreement at Contractor's own expense prior to commencement of the Services.

#### **9. No Recourse against Constituent Members.**

CPA is organized as a Joint Powers Authority in accordance with the Joint Exercise of Powers Act of the State of California (Government Code Section 6500, et seq.) pursuant to the Joint Powers Agreement and is a public entity separate from its constitute members. CPA shall solely be responsible for all debts, obligations and liabilities accruing and arising out of this Agreement. Contractor shall have no rights and shall not make any claims, take any actions or assert any remedies against any of CPA's constituent members in connection with this Agreement.

#### **10. Confidential Information.**

- a. Duty to Maintain Confidentiality. Contractor agrees that Contractor will hold all Confidential Information in confidence, and will not divulge, disclose, or directly or indirectly use, copy, digest, or summarize, any Confidential Information unless necessary to comply with any applicable law, regulation, or in connection with any court or regulatory proceeding applicable in which case, any disclosure shall be subject to this paragraph 10.c. and d., below
- b. Definition of "Confidential Information". The following constitutes "Confidential Information," whether oral or written: (a) the terms and conditions of, and proposals and negotiations related to, this Agreement, (b) information, in whatever form, that CPA shares with Contractor in the course and scope of this Agreement, or (c) information that either Contractor stamps or otherwise identifies as "confidential" or "proprietary" before disclosing it to the other.

Confidential Information shall not include: (1) information that is generally available to the public or in the public domain at the time of disclosure; (2) information that becomes publicly known other than through any breach of this Agreement by Contractor or its Representatives; (3) information which is subsequently lawfully and in good faith obtained by Contractor or its Representatives from a third party, as shown by documentation sufficient to establish the third party as the source of the Confidential Information; provided that the disclosure of such information by such third party is not known by Contractor or its Representatives to be in breach of a confidentiality agreement or other similar obligation of confidentiality; (4) information that Contractor or its Representatives develop independently without use of or reference to Confidential Information provided by Contractor; or (5) information that is approved for release in writing by Contractor.

- c. California Public Records Act. The Parties acknowledge and agree that the Agreement including but not limited to any communication or information exchanged between the Parties, any deliverable, or work product are subject to

the requirements of the California Public Records Act (Government Code Section 6250 et seq.). In order to designate information as confidential, the Disclosing Party must clearly stamp and identify the specific portion of the material designated with the word "Confidential." The Parties agree not to over-designate material as Confidential Information. Over-designation includes stamping whole agreements, entire pages or series of pages as "Confidential" that clearly contain information that is not Confidential Information.

- d. Third Party Request for Confidential Information. Upon request or demand of any third person or entity not a Party hereto pursuant to the California Public Records Act for production, inspection and/or copying of Confidential Information ("Requested Confidential Information"), CPA will as soon as practical notify Contractor in writing via email that such request has been made. CPA will be solely responsible for taking at its sole expense whatever legal steps are necessary to prevent release to the third party of the Confidential Information designated by Contractor. If Contractor takes no such action after receiving the foregoing notice from CPA, CPA shall, at its discretion, be permitted to comply with the third party's request or demand and is not required to defend against it. If Contractor does take or attempt to take such action, Contractor agrees to indemnify and hold harmless CPA, its officers, directors, employees and agents ("CPA Indemnified Parties"), from any claims, liability, award of attorneys' fees, or damages, and to defend any action, claim or lawsuit brought against any of CPA Indemnified Parties for Contractor's attempt to prevent disclosure or CPA's refusal to disclose any Confidential Information.

## **11. Insurance.**

All required insurance coverages shall be substantiated with a certificate of insurance and must be signed by the insurer or its representative evidencing such insurance to CPA within 10 business days after the Agreement is fully executed. The general liability policy shall be endorsed naming Clean Power Alliance of Southern California and its employees, officers and agents as additional insureds. The certificate(s) of insurance and required endorsement shall be furnished to CPA prior to commencement of work and maintained throughout the Term and any Renewal Term. Each certificate shall provide for thirty (30) days advance written notice to CPA of any cancellation or reduction in coverage. Said policies shall remain in force through the life of this Agreement and shall be payable on a per occurrence basis only, except those required by paragraph (d) below which may be provided on a claims-made basis consistent with the criteria noted therein.

Nothing herein shall be construed as a limitation on Contractor's obligation under paragraph 12 of this Agreement to indemnify, defend, and hold CPA harmless from any and all liabilities arising from the Contractor's negligence, recklessness or willful misconduct in the performance of this Agreement. CPA agrees to timely notify the Contractor of any negligence claim.

Failure to provide and maintain the insurance required by this Agreement will constitute a material breach of the Agreement. In addition to any other available remedies, CPA may suspend payment to the Contractor for any services provided during any time that insurance was not in effect and until such time as the Contractor provides adequate evidence that Contractor has obtained the required coverage.

### **a. General Liability**

The Contractor shall maintain a commercial general liability insurance policy in an amount of

no less than one million (\$1,000,000.00) with a two million dollar (\$2,000,000.00) aggregate limit. CPA shall be named as an additional insured on the commercial general liability policy and the Certificate of Insurance shall include an additional endorsement page.

**b. Auto Liability**

Where the services to be provided under this Agreement involve or require the use of any type of vehicle by Contractor in order to perform said services, Contractor shall also provide comprehensive business or commercial automobile liability coverage including non-owned and hired automobile liability in the amount of one million dollars combined single limit (\$1,000,000.00).

**c. Workers' Compensation**

The Contractor acknowledges the State of California requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code. If Contractor has employees, a copy of the certificate evidencing such insurance or a copy of the Certificate of Consent to Self-Insure shall be provided to CPA prior to commencement of work.

**d. Professional Liability Insurance**

Coverages required by this paragraph may be provided on a claims-made basis with a "Retroactive Date" either prior to the date of the Agreement or the beginning of the contract work. If the policy is on a claims-made basis, coverage must extend to a minimum of twelve (12) months beyond completion of contract work. If coverage is cancelled or non-renewed, and not replaced with another claims made policy form with a "retroactive date" prior to the Agreement effective date, the Contractor must purchase "extended reporting" coverage for a minimum of twelve (12) months after completion of contract work. Contractor shall maintain a policy limit of not less than \$1,000,000.00 per incident. If the deductible or self-insured retention amount exceeds \$100,000.00, CPA may ask for evidence that Contractor has segregated amounts in a special insurance reserve fund or Contractor's general insurance reserves are adequate to provide the necessary coverage and CPA may conclusively rely thereon.

Contractor shall be responsible for initiating, maintaining and supervising all safety precautions and programs in connection with the performance of the Agreement. Contractor shall monitor the safety of the job site(s) during the project to comply with all applicable federal, state, and local laws, and to follow safe work practices.

**12. Indemnification.**

Contractor agrees to indemnify, defend, and hold harmless CPA, its employees, officers, and agents, from and against, and shall assume full responsibility for payment of all wages, state or federal payroll, social security, income or self-employment taxes, with respect to Contractor's performance of this Agreement. Contractor further agrees to indemnify, and hold harmless CPA from and against any and all third- party claims, liabilities, penalties, forfeitures, suits, costs and expenses incident thereto (including costs of defense, settlement, and reasonable attorney's fees), which CPA may hereafter incur, become responsible for, or pay out, as a result of death or bodily injuries to any person, destruction or physical damage to tangible property, or any violation of governmental laws, regulations or orders, to the extent caused by Contractor's negligent acts, errors or omissions, or the negligent acts, errors or omissions of Contractor's employees, agents, or subcontractors while in the performance of the terms and conditions of the Agreement, except for such loss or damage arising from the sole negligence or willful

misconduct of CPA, elected and appointed officers, employees, agents and volunteers.

### **13. Independent Contractor.**

- a. Contractor acknowledges that Contractor, its officers, employees, or agents will not be deemed to be an employee of CPA for any purpose whatsoever, including, but not limited to: (i) eligibility for inclusion in any retirement or pension plan that may be provided to employees of Contractor; (ii) sick pay; (iii) paid non-working holidays; (iv) paid vacations or personal leave days; (v) participation in any plan or program offering life, accident, or health insurance for employees of Contractor; (vi) participation in any medical reimbursement plan; or (vii) any other fringe benefit plan that may be provided for employees of Contractor.
- b. Contractor declares that Contractor will comply with all federal, state, and local laws regarding registrations, authorizations, reports, business permits, and licenses that may be required to carry out the work to be performed under this Agreement. Contractor agrees to provide CPA with copies of any registrations or filings made in connection with the work to be performed under this Agreement.

### **14. Compliance with Applicable Laws.**

The Contractor shall comply with any and all applicable federal, state and local laws and, including any policies or resolutions adopted by CPA affecting Services covered by this Agreement.

### **15. Nondiscriminatory Employment.**

Contractor and/or any permitted subcontractor, shall not unlawfully discriminate against any individual based on race, color, religion, nationality, sex, sexual orientation, age, protected veteran status, or condition of disability. Contractor and/or any permitted subcontractor understands and agrees that Contractor and/or any permitted subcontractor is bound by and will comply with the nondiscrimination mandates of all federal, state and local statutes, regulations and ordinances.

### **16. Work Product.**

All finished and unfinished reports, plans, studies, documents and other writings prepared by and for Contractor, its officers, employees and agents in the course of implementing this Agreement shall become the sole property of CPA upon payment to Contractor for such work. CPA shall have the exclusive right to use such materials in its sole discretion without further compensation to Contractor or to any other party. Contractor shall, at CPA's expense, provide such reports, plans, studies, documents and writings to CPA or to any party CPA may designate, upon written request. Contractor may keep file reference copies of all documents prepared for CPA.

### **17. Notices.**

Any notice, request, demand, or other communication required or permitted under this Agreement shall be deemed to be properly given when **both**: (1) transmitted via email to the email address listed below; and (2) sent to the physical address listed below by either being deposited in the United States mail, postage prepaid, or deposited for overnight delivery, charges prepaid, with an established overnight courier that provides a tracking number showing confirmation of receipt.

In the case of CPA, to:

Name/Title: Theodore Bardacke, Executive Director  
Address: 801 S. Grand Ave., Suite 400  
Los Angeles, CA 90017  
Telephone: (213) 269-5890  
Email: tbardacke@cleanpoweralliance.org

With a copy to:

Name/Title: Non-Energy Contracting Manager  
Address: 801 S. Grand Ave., Suite 400  
Los Angeles, CA 90017  
Email: Contracting@cleanpoweralliance.org

In the case of Contractor, to:

Name/Title: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_

### **18. Assignment.**

Neither this Agreement nor any of the Parties' rights or obligations hereunder may be transferred or assigned without the prior written consent of the other Party. Subject to the preceding sentence, this Agreement shall be binding upon and inure to the benefit of the Parties and their respective successors and permitted assigns.

### **19. Subcontracting.**

Contractor may not subcontract Services to be performed under this Agreement without the prior written consent of CPA. If the CPA's written consent to a subcontract is not obtained, Contractor acknowledges and agrees that CPA will not be responsible for any fees or expenses claimed by such subcontractor.

### **20. Retention of Records and Audit Provision.**

Contractor and any subcontractors authorized by the terms of this Agreement shall keep and maintain on a current basis full and complete documentation and accounting records, employees' time sheets, and correspondence pertaining to this Agreement. Such records shall include, but not be limited to, documents supporting all income and all expenditures. CPA shall have the right, during regular business hours, to review and audit all records relating to this Agreement during the Agreement period and for at least five (5) years from the date of the completion or termination of this Agreement. Any review or audit may be conducted on Contractor's premises or, at CPA's option, Contractor shall provide all records within a maximum of fifteen (15) days upon receipt of written notice from CPA. Contractor shall refund any monies erroneously charged. Contractor shall have an opportunity to review and respond to or refute any report or summary of audit findings, and shall promptly refund any overpayments made by CPA based on undisputed audit findings.



## **21. Conflict of Interest.**

- a. No CPA employee whose position with the CPA enables such employee to influence the award of this Agreement or any competing Agreement, and no spouse or economic dependent of such employee, shall be employed in any capacity by the contractor or have any other direct or indirect financial interest in this Agreement. No officer or employee of the Contractor who may financially benefit from the performance of work hereunder shall in any way participate in the CPA's approval, or ongoing evaluation, of such work, or in any way attempt to unlawfully influence the CPA's approval or ongoing evaluation of such work.
- b. The Contractor shall comply with all conflict of interest laws, ordinances, and regulations now in effect or hereafter to be enacted during the term of this Agreement. The Contractor warrants that it is not now aware of any facts that create a conflict of interest. If the Contractor hereafter becomes aware of any facts that might reasonably be expected to create a conflict of interest, it shall immediately make full written disclosure of such facts to CPA. Full written disclosure shall include, but is not limited to, identification of all persons implicated and a complete description of all relevant circumstances. Failure to comply with the provisions of this paragraph shall be a material breach of this Agreement.

## **22. Publicity.**

Contractor shall not issue a press release or any public statement regarding the Agreement, Services contemplated by this Agreement, or any other related transaction unless CPA has agreed in writing the contents of any such public statement.

## **23. Governing Law, Jurisdiction, and Venue**

This Agreement shall be governed by, and construed in accordance with, the laws of the State of California. The Contractor agrees and consents to the exclusive jurisdiction of the courts of the State of California for all purposes regarding this Agreement and further agrees and consents that venue of any action brought hereunder shall be exclusively in the County of Los Angeles.

## **24. Amendments**

None of the terms and conditions of this Agreement may be changed, waived, modified or varied in any manner whatsoever unless in writing duly signed by the Parties.

## **25. Severability**

Should any provision of this Agreement be held invalid or unenforceable by a court of competent jurisdiction, such invalidity will not invalidate the whole of this Agreement, but rather, the remainder of the Agreement which can be given effect without the invalid provisions, will continue in full force and effect and will in no way be impaired or invalidated.

## **26. Complete Agreement**

This Agreement constitutes the entire Agreement between the parties. No modification or amendment shall be valid unless made in writing and signed by each party. Failure of either party to enforce any provision or provisions of this Agreement will not waive any enforcement of any continuing breach of

the same provision or provisions or any breach of any provision or provisions of this Agreement.

**27. Counterparts**

This Agreement may be executed in one or more counterparts, including facsimile(s), emails, or electronic signatures, each of which shall be deemed an original and all of which together will constitute one and the same instrument.

**IN WITNESS WHEREOF**, the parties have executed this Agreement on the date first above written.

[Name of contractor].

Clean Power Alliance of Southern California

\_\_\_\_\_  
By: [Name]

\_\_\_\_\_  
By: Theodore Bardacke

Title: [Fill in]

Title: Executive Director



**ATTACHMENT E  
CAMPAIGN CONTRIBUTION DISCLOSURE FORM**

**Government Code Section 84308**

In accordance with California law, proposers and contracting parties are required to disclose, at the time a proposal is submitted or pre-qualified provider receives a Task Order solicitation, information relating to any campaign contributions made to Clean Power Alliance of Southern California's (CPA) Regular or Alternate Directors, including: the name of the party making the contribution (which includes any parent, subsidiary or otherwise related business entity, as defined below), the amount of the contribution, and the date the contribution was made. 2 Cal. Code of Regs. (C.C.R.) §18438.8(b).

California law prohibits a party, participant, or an agent, from making campaign contributions to a CPA Director of more than \$250 while their contract is pending before the CPA Board; and **further prohibits any campaign contribution of more than \$250 from being made for three (3) months following the date of the final decision by the CPA Board.** Gov't Code §84308(d).

For purposes of reaching the \$250 limit, the campaign contributions of the proposer or contractor plus contributions by its parents, affiliates, and related companies of the contractor or proposer are added together. 2 C.C.R. §18438.5.

In addition, a CPA Director must abstain from voting on a contract or permit if they have received a campaign contribution from a party or participant to the proceeding, or agent, totaling more than \$250 in the 12-month period prior to the consideration of the item by the CPA Board. Gov't Code §84308(c).

The names of the Regular and Alternate Directors and their member agency is attached hereto as Exhibit A. **Please note that Exhibit A may change from time to time. It is the contractor's or proposer's responsibility to comply with Section 84308.**

\* \* \* \* \*

Every proposer or contractor must disclose as follows:

**Section 1**

Proposer/Contractor (Legal Name)\_\_\_\_\_.

List any parent, subsidiaries, or otherwise affiliated business entities of Contractor (See definitions in 2 C.C.R.. §18703.1(d)):

\_\_\_\_\_  
\_\_\_\_\_

\*Attach additional pages, if necessary

**Section 2**

Has Contractor or Proposer (identified in Section 1) and/or any parent, subsidiary, or

affiliated company, or agent thereof, made a campaign contribution(s) totaling \$250 or more in the aggregate to a Director of CPA's Board in the 12 months preceding the date of execution of this disclosure?

Yes

No

If YES, proceed to Section 3 and complete. Then, sign and date under Section 4.

If NO, proceed to Section 4.

**Section 3**

<b>Regular/Alternate Director</b>	<b>Amount of Contribution</b>	<b>Date of Contribution</b>

\*Attach additional pages, if necessary

**Section 4**

I, \_\_\_\_\_, [print name] am authorized to sign this disclosure on behalf of the Contractor/Proposer identified in Section 1. I acknowledge and understand Government Code Section 84308 requirements, including any continuing compliance obligations. I declare the foregoing disclosures to be true and correct.

TITLE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DISCLOSURE DATE: \_\_\_\_\_

The following individuals listed are elected officials who serve on Clean Power Alliance’s Board of Directors as either Regular or Alternate Directors. Non-elected alternate directors are not included, unless they are campaigning for elected office.

**REGULAR DIRECTORS**

<b>County/City</b>	<b>Regular Directors</b>
<b>1. Agoura Hills</b>	Deborah Klein Lopez
<b>2. Alhambra</b>	Jeff Maloney
<b>3. Arcadia</b>	Sho Tay
<b>4. Beverly Hills</b>	Julian Gold
<b>5. Calabasas</b>	Mary Sue Maurer
<b>6. Camarillo</b>	Susan Santangelo
<b>7. Carson</b>	Jawane Hilton
<b>8. Claremont</b>	Corey Calaycay
<b>9. Culver City</b>	Daniel Lee
<b>10. Downey</b>	Sean Ashton
<b>11. Hawaiian Gardens</b>	Myra Maravilla
<b>12. Hawthorne</b>	Alex Monteiro
<b>13. LA County</b>	Sheila Kuehl
<b>14. Malibu</b>	Mikke Pierson
<b>15. Manhattan Beach</b>	Hildy Stern
<b>16. Moorpark</b>	Janice Parvin
<b>17. Ojai</b>	Betsy Stix
<b>18. Oxnard</b>	Bert Perello
<b>19. Paramount</b>	Vilma Cuellar Stallings
<b>20. Redondo Beach</b>	Christian Horvath
<b>21. Rolling Hills Estates</b>	Steve Zuckerman

<b>22. Santa Monica</b>	Vacant
<b>23. Sierra Madre</b>	Robert Parkhurst
<b>24. Simi Valley</b>	Ruth Luevanos
<b>25. South Pasadena</b>	Diana Mahmud
<b>26. Temple City</b>	Fernando Vizcarra
<b>27. Thousand Oaks</b>	Bob Engler
<b>28. City of Ventura</b>	Sofia Rubalcava
<b>29. Ventura County</b>	Linda Parks
<b>30. West Hollywood</b>	Lindsey Horvath
<b>31. Westlake Village</b>	Kelly Honig
<b>32. Whittier</b>	Fernando Dutra

### **ALTERNATE DIRECTOR(S)**

<b>County/City</b>	<b>Alternate Director(s)</b>
<b>1. Agoura Hills</b>	Linda Nothrup Louis Celaya
<b>2. Alhambra</b>	Sasha Perez Martin Ray
<b>3. Arcadia</b>	Dominic Lazzaretto Tom Tait
<b>4. Beverly Hills</b>	Robert Wunderlich
<b>5. Calabasas</b>	David Shapiro John Bingham
<b>6. Camarillo</b>	Sean Mulchay Tony Trembley
<b>7. Carson</b>	Cedric L. Hicks Sr. Reata Kulcsar

<b>8. Claremont</b>	Jennifer Stark
<b>9. Culver City</b>	Yasmine-Imani McMorrin Joe Susca
<b>10. Downey</b>	Catherine Alvarez Mario Trujillo
<b>11. Hawaiian Gardens</b>	Ramie L. Torres
<b>12. Hawthorne</b>	Akbar Farokhi Frank Feng
<b>13. LA County</b>	Holly Mitchell Gary Gero
<b>14. Malibu</b>	Steve Uhring Christine Shen
<b>15. Manhattan Beach</b>	Richard Montgomery Dana Murray
<b>16. Moorpark</b>	Jessica Sandifer
<b>17. Ojai</b>	William Weirick Michelle Ellison
<b>18. Oxnard</b>	Vianey Lopez Kathleen Mallory
<b>19. Paramount</b>	Isabel Aguayo Adriana Figueroa
<b>20. Redondo Beach</b>	Ted Semaan
<b>21. Rolling Hills Estates</b>	Debby Stegura Jeannie Naughton
<b>22. Santa Monica</b>	David Pettit Pam O'Connor
<b>23. Sierra Madre</b>	Gabe Engeland James Carlson
<b>24. Simi Valley</b>	Keith Mashburn Samantha Argabrite
<b>25. South Pasadena</b>	Michael Cacciotti Kim Hughes

<b>26. Temple City</b>	William Man Tom Chavez
<b>27. Thousand Oaks</b>	Cliff Finley Helen Cox
<b>28. City of Ventura</b>	Mike Johnson Joe Yahner
<b>29. Ventura County</b>	Carmen Ramirez
<b>30. West Hollywood</b>	Lauren Meister Robyn Eason
<b>31. Westlake Village</b>	Brad Halpern Phillippe Eskandar
<b>32. Whittier</b>	Henry Bouchot Vicki Smith



**ATTACHMENT G**  
**CPA Pro Forma Non-Disclosure Agreement, CPA Privacy and Customer Confidentiality Policy, and CPA Protection of Confidential Information Policy**

[Date]

Clean Power Alliance of Southern California  
801 S. Grand Ave., Suite 400  
Los Angeles, CA 90017

[Counterparty Name]  
[Counterparty Address]  
[City, State, Zip]

RE: [Mutual] Non-Disclosure Agreement  
[Include “Mutual” if both CPA and Company intend to exchange Confidential Information]

In connection with [describe with particularity the purpose of entering into this NDA, e.g., to complete a commercial transaction “x” relating to “x”, to share regulatory strategy regarding “x” proceeding, etc.] (“[Create an abbreviation defining the situation, e.g., “Transaction,” “Regulatory Proceeding,” or “Purpose”]”) between [Name of Counterparty] (“Company”) and the Clean Power Alliance of Southern California (“CPA”) relating to [if the need for this NDA arises out of a dispute or controversy, describe that dispute or controversy or a settlement of any such dispute or controversy and discuss with legal prior to completing NDA] (the “Incident”), either Party may make available to the other Party and its Representatives certain information, which is non-public, confidential and/or proprietary in nature. As a condition to any such information being furnished, the Parties agrees that they will, and will cause their respective Representatives to, treat any such information in accordance with, and otherwise comply with, the terms and conditions set forth in this letter agreement (this “Agreement”) effective as of the Effective Date, as defined below. [Legal optional language: “The Parties agree that the Settlement Discussion will be conducted pursuant to and in accordance with Rule 12.6 of the California Public Utilities Commission’s Rules of Practice and Procedure provided, however, that nothing contained herein limits either Party from using any Confidential Information, defined in Section 1, for any authorized purpose in a manner permitted by law.”]

**1. Certain Defined Terms.**

(a) The term “Affiliate” shall mean any company, corporation, or other entity, which controls, is controlled by, or is under common control with a Party now and shall be considered an Affiliate only so long as the ownership or control, directly or indirectly, meets the conditions set forth herein; provided that any “Confidential Information” provided by or about an Affiliate prior to its cessation as an Affiliate shall remain subject to the terms of this Agreement. For purposes of this definition, “control” shall mean the possession, directly or indirectly, of the power to direct or cause the direction of the management or policies of an entity, whether through the ability to exercise voting power, by contract or otherwise.

(b) The term “Confidential Information” means all confidential, proprietary, or



sensitive information including, without limitation, trade secrets, know-how, formulae, processes, ideas, inventions (whether or not patentable), schematics, and other technical, business, financial, company and product development information or data as well as other sensitive or proprietary information or data (whether or not reduced to writing), which is disclosed or made available by the Disclosing Party or Disclosing Party's Affiliates to the Receiving Party or Receiving Party's Affiliates and (a) if disclosed orally, is orally identified at the time of disclosure or promptly thereafter in writing or electronically as confidential or proprietary, or (b) that, regardless of the form of disclosure, whether written, graphic, photographic, electronic, visual or otherwise, including but not limited to data, documents, reports, financial statements, marketing data, client information, correspondence and communications, or should be marked as "Confidential" or should contain a marking that the Receiving Party may reasonably understand contains confidential or proprietary information. "**Confidential Information**" includes all copies of such information and all memoranda, notes, reports, analyses, forecasts, summaries, data, compilations, studies and other materials containing, reflecting, interpreting or based upon, in whole or in part, any Confidential Information. The Parties acknowledge and agree that the "**Confidential Information**" is subject to the requirements of the California Public Records Act (Government Code Section 6250 et seq.) ("**CPRA**"). In that regard, the Parties agree and acknowledge that no waiver, whether express or implied, of any privilege, exemption, or prohibition from disclosure pursuant to federal or state law is intended.

Notwithstanding the foregoing, the term "**Confidential Information**" does not include information that the Receiving Party can demonstrate (i) has become available to the public other than as a result of a disclosure by the Receiving Party or its Representatives in breach of the terms hereof, (ii) was in Receiving Party's possession prior to first being furnished to Receiving Party or any of its Representatives by or on behalf of the Disclosing Party or any of its Representatives, provided that, to the best knowledge of Receiving Party or its Representatives, as the case may be, the source of such information was not bound by a confidentiality agreement with, or other contractual, legal or fiduciary obligation of confidentiality to, Disclosing Party or any other person that prohibited such disclosure, (iii) has become available to Receiving Party or its Representatives from a source other than Disclosing Party or its Representatives, provided that, to the best knowledge of Receiving Party or its Representatives, as the case may be, the source of such information was not bound by a confidentiality agreement with, or other contractual, legal or fiduciary obligation of confidentiality to, Disclosing Party or any other person that prohibited such disclosure, or (iv) has already been or is hereafter independently developed by Receiving Party or its Representatives by persons who had no access to, and developed such information without reference to or reliance upon, the Confidential Information and is evidenced by documentation that was in Receiving Party's possession prior to disclosure.

(c) The term "**Disclosing Party**" shall mean the Party or its Representatives that discloses or otherwise furnishes "Confidential Information" to the Receiving Party, whether the Confidential Information is prepared by the Party or its Representatives.

(d) The term "**Receiving Party**" shall mean the Party or its Representatives that receives "Confidential Information," as defined herein, from the Disclosing Party whether prepared or furnished by the Disclosing Party.

(e) As used herein, "**Party**" shall refer to CPA or Company, individually, and "**Parties**" shall refer to CPA and Company, collectively.

(f) The term "**Representative**" means, as to any person, such person's affiliates, and its and their respective directors, officers, managers, partners, members, employees, agents,

and advisors (including, without limitation, financial advisors, auditors, consultants, legal counsel, accountants, and lenders provided that in no event shall lender include any potential lenders) and the term “**person**” means any natural person or legal entity, including, without limitation, any corporation, general or limited partnership, limited liability company, trust, or other entity or company, that has a legitimate business reason to access the Confidential Information and who agrees in writing to abide by the terms and conditions of this Agreement.

**2. Use and Non-Disclosure of Confidential Information.** Receiving Party recognizes and acknowledges the legal, commercial, and competitive value and confidential nature of the Confidential Information and the damage that could result to Disclosing Party if any information contained therein is disclosed to a third party. In consideration of the Disclosing Party’s disclosure of the Confidential Information to the Receiving Party, the Receiving Party agrees that it and its Representatives (a) will treat all Confidential Information as strictly confidential; (b) will only use the Confidential Information as necessary for the [**“Transaction,” “Settlement,” “Purpose” – please use the term you defined in the first paragraph, above, to describe the purpose of the NDA**] and for no other purpose, including, without limitation, in any way detrimental to the Disclosing Party, (c) will protect all Confidential Information, whether in storage or in use, with the same degree of care as the Receiving Party uses to protect its own Confidential Information against public disclosure, but in no case with less than reasonable care; (d) will disclose Confidential Information only to such Representatives of the Receiving Party and its Affiliates who need to know such Confidential Information for the Purpose, provided such Representatives are informed of the confidential nature of such Confidential Information and the terms of this Agreement prior to disclosure and provided further that the Receiving Party shall be responsible in the event of such Representative’s breach of this Agreement as if the Receiving Party had committed such breach; and (e) will not reverse engineer any such Confidential Information. In addition, except upon mutual written agreement, or as may be required by law, neither Party to this Agreement shall in any way or in any form disclose the discussions that gave rise to this Agreement or the fact that there have been, or will be, discussions or negotiations covered by this Agreement.

Notwithstanding the foregoing, Confidential Information may be disclosed (x) with Disclosing Party’s prior written consent, or (y) in accordance with Paragraph 3 below.

**3. Required Disclosure.** If either Party is requested or required pursuant to a law, including the CPRA, by a court, or by an administrative or regulatory agency of competent jurisdiction to disclose any Confidential Information, that Party must promptly notify the other Party of the request for disclosure and, absent the prior written consent of the non-disclosing Party to the disclosure, will take lawful steps to protect against the disclosure of any Confidential Information. If the non-disclosing Party takes no action after receiving the foregoing notice, the Party receiving the disclosure request shall, at its sole discretion, be permitted to comply with the request or requirement. If the non-disclosing Party takes action or attempts to take action after receiving the foregoing notice, the non-disclosing Party shall proceed with any such action, at the non-disclosing Party’s sole expense, and agrees to indemnify and hold harmless the Party receiving the disclosure request from any claims, liability, award of attorneys’ fees, damages, costs, or expenses incurred or awarded in connection with any judgment, determination, order, writ, injunction, decision, or ruling requiring disclosure of the Confidential Information.

**4. Ownership, Return, and Destruction of Confidential Information.** All Confidential Information provided pursuant to this Agreement will remain the property of the Disclosing Party, and neither this Agreement nor any disclosure of Confidential Information pursuant hereto shall be construed as granting (expressly or by implication) to Receiving Party or any of its Representatives

any license or other intellectual property right with respect to any of the Confidential Information. At any time after the Term of this Agreement, at the request of Disclosing Party, in its sole discretion and for any reason or no reason, Receiving Party will promptly, at its option, either destroy or deliver to Disclosing Party all Confidential Information and cause its Representatives to do the same (and if requested by Disclosing Party, will confirm in writing compliance with this provision to Disclosing Party within 15 calendar days of the foregoing decision or request). Notwithstanding the foregoing, Receiving Party and its Representatives may retain data or records in electronic form containing Confidential Information for the purposes of backup, recovery, contingency planning or business continuity planning, so long as (x) such data or records, to the extent not permanently deleted or overwritten in the ordinary course of business, are not accessible in the ordinary course of business and are not accessed except as required for backup, recovery, contingency planning or business continuity purposes and (y) to the extent such data or records are restored or otherwise become accessible, they are permanently deleted. Notwithstanding the return or destruction of the Confidential Information, Receiving Party and its Representatives will continue to be bound by the obligations of confidentiality and the other applicable obligations and agreements under this Agreement.

## 5. General.

(a) Term. This Agreement shall be effective upon the date that both Parties have signed this Agreement (the “**Effective Date**”) and will remain in effect for (i) [three (3) years] [Consider how long CPA or the Company needs the information to remain confidential], or (ii) until the [“**Transaction**,” “**Settlement**,” “**Purpose**”] is complete, whichever is later (“**Term**”). [Subdivision (ii) may not be necessary depending on the situation]

(b) No Warranty. The Receiving Party acknowledges that the Disclosing Party has neither made any representations nor given any warranties as to the accuracy or completeness of the Confidential Information for the Receiving Party’s purposes. The Receiving Party agrees that the Disclosing Party shall not by virtue of this Agreement have any liability or responsibility for errors or omissions in, or any decisions made by the Receiving Party in reliance on, any Confidential Information disclosed under this Agreement. CONFIDENTIAL INFORMATION IS PROVIDED ON AN “AS-IS” BASIS AND DISCLOSING PARTY EXPRESSLY DISCLAIMS ANY WARRANTIES WITH RESPECT TO ACCURACY, RELIABILITY, COMPLETENESS, MERCHANTABILITY OR FITNESS FOR ANY PURPOSE.

(c) Notice. The Receiving Party will notify the Disclosing Party in writing promptly upon the occurrence of any unauthorized release of Confidential Information or breach of this Agreement of which it is aware.

This notice and any notice required herein shall be provided by *both* electronic mail and U.S. Mail to the following individuals at the following address:

CPA: [name of CPA business owner]  
801 S. Grand Ave., Suite 400  
Los Angeles, CA 90017  
Email: [email address]

With a copy to:  
Nancy Whang, General Counsel  
801 S. Grand Ave., Suite 400

Los Angeles, CA 90017  
Email: [nwhang@cleanpoweralliance.org](mailto:nwhang@cleanpoweralliance.org)

Company: [name] and [address and email address]

(d) Disclaimer. This Agreement is neither intended to create, nor shall it be construed as creating, (i) a joint venture, partnership or other form of business association between the Parties, (ii) an obligation to buy or sell products using or incorporating the Confidential Information, (iii) an implied or express license grant from either Party to the other, (iv) any obligation to continue discussions or negotiations with respect to any potential agreement between the Parties or (v) an agreement to enter into any agreement.

(e) Entire Agreement. This Agreement constitutes the entire agreement and understanding of the Parties in respect of the subject matter hereof and supersedes all prior understandings, agreements or representations by or among the Parties, written or oral, to the extent they relate in any way to the subject matter hereof.

(f) Assignment; Binding Effect. No Party may assign this Agreement or any of its rights, interests or obligations hereunder without the prior written consent of the other Party, which shall not be unreasonably withheld, and any purported assignment by a Party without prior written consent of the other Party will be null and void and not binding on such other Party. Subject to the preceding sentence, all of the terms, agreements, covenants, representations, warranties and obligations of this Agreement are binding upon, and inure to the benefit of and are enforceable by, the Parties and their respective successors and assigns.

(g) Equitable Relief; Remedies. Receiving Party acknowledges and agrees that Disclosing Party would be damaged irreparably and would not have an adequate remedy at law if any provision of this Agreement is not performed in accordance with its specific terms or is otherwise breached. Accordingly, in addition to any other remedy to which Disclosing Party may be entitled, at law or in equity, Disclosing Party will be entitled to an injunction or injunctions to prevent breaches or threatened breaches of the provisions of this Agreement and to enforce specifically this Agreement and its provisions, without bond or other security being required and without any proof of actual damages. The rights, obligations and remedies created by this Agreement are cumulative and in addition to any other rights, obligations or remedies otherwise available at law or in equity. In the event of litigation relating to this Agreement, if a court of competent jurisdiction determines in a final, non-appealable order that this Agreement has been breached by Receiving Party or any of its Representatives, Receiving Party shall reimburse Disclosing Party for any and all costs and expenses including, without limitation, attorneys' fees and expenses incurred in connection with all such litigation. Nothing herein will be considered an election of remedies or a waiver of the right to pursue any other right or remedy to which a Party may be entitled.

(h) Governing Law and Forum Selection. This Agreement will be governed by and interpreted in accordance with the laws of the State of California, without giving effect to any choice of law principles that would result in the application of the laws of any other jurisdiction. The Parties agree that any suit, action or other legal proceeding by or against any Party (or its Affiliates or Representatives) with respect to or arising out of this Agreement shall be brought in the courts of the State of California sitting in the City and County of Los Angeles, California.

(i) Amendment. This Agreement may not be amended or modified except by a writing signed by both of the Parties.

(j) Severability. The provisions of this Agreement will be deemed severable and the invalidity or unenforceability of any provision will not affect the validity or enforceability of the other provisions hereof.

(k) Waiver. The waiver, express or implied, by any Party of any of its rights arising under this Agreement shall not constitute or be deemed a waiver of any other right hereunder, whether of a similar or dissimilar nature.

By executing below, the Parties agree and accept this Agreement with respect to the subject matter contained herein as of the Effective Date. Each signatory hereby represents, warrants, and certifies that he or she is duly authorized to execute this Agreement on behalf of his or her Party.

Clean Power Alliance of Southern California

[Counterparty Name]

By:  
Name: Theodore Bardacke  
Title: Executive Director  
Date: \_\_\_\_\_, 2020

By:  
Name:  
Title:  
Date: \_\_\_\_\_, 2020

**Clean Power Alliance  
Administrative Policies and Procedures**

Policy Title	CPA Privacy and Customer Confidentiality Policy		
Policy Number	CPA2018-02	Effective Date:	06/07/2018
Reference:	CPUC Decision 97-10-031		

**1. Definition of Terms**

**2. California Public Utilities Commission (CPUC)**

A regulatory agency that regulates privately owned public utilities in the state of California, including electric power, telecommunications, natural gas and water companies.

**3. Policy**

**4. Notice of Accessing, Collecting, Storing, Using, and Disclosing Energy Usage Information**

Clean Power Alliance (CPA), its employees, agents, contractors, and affiliates shall maintain the confidentiality of individual customers’ names, service addresses, billing addresses, telephone numbers, email addresses, account numbers, and electricity consumption, except where reasonably necessary to conduct CPA's business or to provide services to customers as required by the California Public Utilities Commission (CPUC). Examples of reasonably necessary business purposes include but are not limited to when such disclosure is necessary to (a) comply with law, regulation, or court order;

(b) enable CPA to provide services to its customers; (c) collect unpaid bills; (d) obtain and provide credit reporting information; (e) resolve customer disputes or inquiries; (f) communicate about demand response, energy efficiency, energy management, and conservation programs, or (g) in situation of imminent threat to life or property. CPA shall not, under any circumstances, disclose customer information for third-party telemarketing, e-mail, or direct mail solicitation. Aggregated data that cannot be traced to specific customers may be released at CPA's discretion.

Customer data, including individual customer names, addresses, and electric energy usage data, is collected via Southern California Edison’s metering systems. CPA may

share customer data with contractors and vendors for purposes of providing services and operating programs. Contractors and vendors are required to agree to only use customer data for program operational purposes and protect it under the same standards as CPA maintains customer-specific energy usage and billing information for only as long as reasonably necessary, typically not more than five years unless otherwise necessary by law or regulation.

The effective date of this version of the Privacy and Consumer Confidentiality Policy is June 7, 2018. Notice of this policy will be provided when confirming a new customer account and annually to customers via an on-bill message to guide customers to the most updated version of CPA's website at [www.CleanPowerAlliance.org](http://www.CleanPowerAlliance.org). Any changes to this policy between notification periods will be communicated through CPA's website.

Customers having any questions or concerns regarding the collection, storage, use, or distribution of customer information, or who wish to view, inquire about, or dispute any customer information held by CPA or limit the collection, use, or disclosure of such information, may contact Tyler Aguirre, by phone at (213) 269-5870, via email at [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org) or by mail at 555 W. 5th Street, 35th Floor, Los Angeles, CA, 90013.

**CLEAN POWER ALLIANCE OF SOUTHERN CALIFORNIA (CPA) PRIVACY AND  
CUSTOMER CONFIDENTIALITY  
POLICY ACKNOWLEDGEMENT**

I have read the Privacy and Customer Confidentiality Policy and understand its provisions.

I understand that to ensure the protection of the integrity of CPA's confidential information as well as the confidentiality of others, confidential information may not be shared with unauthorized individuals within or outside of the organization and may not be transmitted via email.

I accept responsibility for any action performed under my user name and password, or as a representative of CPA.

I understand that handling and use of confidential information in violation of the Privacy and Customer Confidentiality Policy may result in employee discipline, up to and including termination and/or termination of roles, responsibilities, contracts, or agreements.

By signing this form, I agree to abide by the policy currently in place and I agree to review periodically any changes or modifications. I understand that my regular review of this policy is required. I understand updates to this policy are available online.

Name Emp. ID  
(Print): (If applicable):\_\_\_\_\_

Signature: Date:\_\_\_\_\_

Executive Director  
Signature:\_\_\_\_\_

Date:\_\_\_\_\_

This document will be maintained in CPA's files.

**Clean Power Alliance  
Administrative Policies and Procedures**



Policy Title	CPA Protection of Confidential Information Policy		
Policy Number	CPA2018-03	Effective Date:	06/07/2018
Reference:	CPUC Decision 97-10-031		

**1. Definition of Terms**

**2. California Public Utilities Commission (CPUC)**

A regulatory agency that regulates privately owned public utilities in the state of California, including electric power, telecommunications, natural gas and water companies.

**3. Policy**

**4. Ensuring Customer Confidentiality is Protected**

To ensure that all employees protect the integrity of CPA’s confidential information as well as the confidentiality of others, confidential information may not be shared with unauthorized individuals within or outside of the organization and may not be transmitted via email, except where reasonably necessary to conduct CPA’s business or provide services to customers as required by the California Public Utilities Commission (CPUC).

**5. Procedure**

- A. Confidential information cannot be transmitted or forwarded to individuals within or outside of the organization who do not have an authorized need to know the information.
  - B. Confidential information cannot be transmitted via email.
  - C. Confidential information cannot be posted on CPA’s website.
  - D. Employees must lock his/her computer when leaving their computer.
- E Passwords may not be shared with any person and cannot be stored physically or digitally.
- A. Documents containing confidential information must be secured at all times.
  - B. Documents containing confidential information must be shredded when destroyed when no longer used and as per the adopted retention schedule if applicable.

- C. Employees are responsible for any action performed under their user name and password.
- D. Examples of reasonably necessary business purposes include but are not limited to when such disclosure is necessary to:
  - 1. Comply with law, regulation, or court order;
  - 2. Enable CPA to provide services to its customers;
  - 3. Collect unpaid bills;
  - 4. Obtain and provide credit reporting information’
  - 5. Resolve customer disputes or injuries;
  - 6. Communicate about demand response, energy efficiency, energy management, and conservation programs, or
  - 7. In situation of imminent threat to life or property.
- E. Failure to comply with the provisions of this policy and procedure may result in discipline up to and including discharge.

**CLEAN POWER ALLIANCE OF SOUTHERN CALIFORNIA (CPA) PROTECTION OF  
CONFIDENTIAL INFORMATION  
POLICY ACKNOWLEDGEMENT**

I have read the Protection of Confidential Information Policy and understand its provisions.  
I understand that to ensure the protection of the integrity of CPA's confidential information as well as the confidentiality of others, confidential information may not be shared with unauthorized individuals within or outside of the organization and may not be transmitted via email.

I accept responsibility for any action performed under my user name and password, or as a representative of CPA.

I understand that handling and use of confidential information in violation of the Protection of Confidential Information Policy may result in employee discipline, up to and including terminations and/or termination of roles, responsibilities, contracts, or agreements.

By signing this form, I agree to abide by the policy currently in place and I agree to review periodically any changes or modifications. I understand that my regular review of the policy is required. I understand updates to the policy are available online.

Name Emp. ID  
(Print): (If applicable): \_\_\_\_\_

Signature: Date: \_

Executive Director  
Signature: \_

Date: \_

This document will be maintained in CPA's files.

# ATTACHMENT H Example Mailers

## Project 1 examples: Move-in Mailers Lean Move-in Mailer



PO Box 13696  
Los Angeles, CA 90013

¡Aviso de su nuevo proveedor de electricidad, Clean Power Alliance!  
Ahora puede disfrutar de los beneficios de la energía limpia y renovable con tarifas competitivas.

來自您的新電力供應商「清潔電力聯盟」的通知  
您現在能以具有競爭力的價格享受清潔、可再生電力的種種益處。

Presorted Standard U.S. Postage  
**PAID**  
Los Angeles, CA Permit No 2342

### Notice from your new electricity provider, Clean Power Alliance!

You can now enjoy the benefits of clean, renewable power at competitive rates.



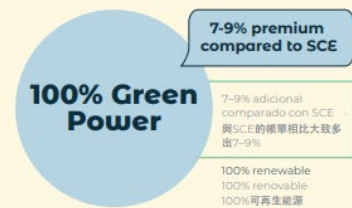
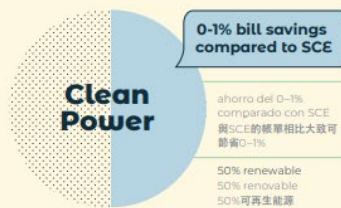
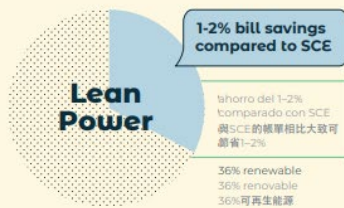
To learn more, change your rate, or opt out, visit [cleanpoweralliance.org/rates](http://cleanpoweralliance.org/rates) or call us at 888-585-3788 (TTY 323-214-1296). Our call center speaks 26 languages!

### Your Rate Options

Clean Power Alliance offers three competitively priced options for electricity at your home or business. Your city or county chose **Lean Power** as your default rate, but you can choose to change your rate or opt out and choose SCE as your energy supplier by visiting [cleanpoweralliance.org/rates](http://cleanpoweralliance.org/rates) or calling 888-585-3788.

**Sus opciones de tarifa** Clean Power Alliance ofrece tres opciones de electricidad con precios competitivos para su hogar o empresa. Su ciudad o condado escogieron **Lean Power (Energía Lean, 36% renovable)** como su tarifa predeterminada, pero usted puede optar por cambiar su tarifa u optar por dejar el servicio y escoger a SCE como su proveedor de energía visitando [cleanpoweralliance.org/rates](http://cleanpoweralliance.org/rates) o llamando al 888-585-3788.

您的費率方案 清潔電力聯盟為您住宅或企業提供三種價格具有競爭力的電力方案。貴市或 貴縣選定 **Lean Power (精益電力)** 作為您的預設方案，不過您可以透過造訪 [cleanpoweralliance.org/rates](http://cleanpoweralliance.org/rates) 或致電 888-585-3788。



Pricing shown above is for a typical residential or business customer. Select commercial rates may be higher. Please contact Clean Power Alliance for more information.  
Las tarifas arriba están para clientes residenciales o de negocio típicos. Algunas tarifas comerciales podrían ser más altas. Por favor, contacte a Clean Power Alliance para más información.  
下面列出的價格適用於一般住宅客戶或企業客戶。某些商業電費價格可能較高。如需更多信息，請聯繫清潔電力聯盟。

#### Terms and Conditions of Service

Clean Power Alliance electric generation rates are competitive. Available rates can be reviewed at [cleanpoweralliance.org](http://cleanpoweralliance.org) or by contacting Clean Power Alliance at 888-585-3788 (TTY 323-214-1296). **Clean Power Alliance rates are subject to change and changes will be adopted at duly noticed public meetings of the Clean Power Alliance Board of Directors.**

Southern California Edison (SCE) collects from Clean Power Alliance customers a shared charge for delivering power to your home or business and for providing other services. These components of your electric bill are the same whether you buy electricity from Clean Power Alliance or SCE.

Southern California Edison also charges Clean Power Alliance customers a Power Charge Indifference Adjustment (PCIA) and a Franchise Fee Surcharge. Both are calculated based on the number of kilowatt hours used each month. The PCIA is intended to ensure that customers who switch to Clean Power Alliance pay for energy that was acquired by SCE to serve them prior to their switch. Note that Clean Power Alliance rates are competitive with SCE's rates, even with these fees.

**Billing:** Each month, Clean Power Alliance customers receive a single monthly bill from SCE, just as they would under SCE's bundled service. This bill includes all electric charges, including Clean Power Alliance's power generation charges. SCE will continue to charge you for transmission and distribution services they provide; this includes the cost of transmitting electricity to your home or business.

**Enrollment:** You were automatically enrolled in Clean Power Alliance when you began electric service on this account.

**Discount Programs:** If you are currently enrolled in the California Alternative Rates for Energy (CARE) program, the Family Electric Rate Assistance (FERA) program, Medical Baseline, Level Pay or Summer Discount Program, you will continue to receive all benefits and discounts as a Clean Power Alliance customer.

**Opt out:** You have the right to opt out without penalty at any time. You will not be charged any fees by Clean Power Alliance if you opt out or if you cannot electric service altogether (for example, if you move). However, customers who opt out of Clean Power Alliance after service launch may be charged a one-time account processing fee by SCE (currently \$0 cents), and will be prevented by SCE from returning to Clean Power Alliance for a minimum of twelve months. By opting out, you will also be subject to SCE's then current rates and terms and conditions of service. For details on SCE's rates and terms and conditions, please visit [sccomplnc.com](http://sccomplnc.com). If you opt out, you will still be charged for all electricity you used before the transfer of electric service. Accounts will be transferred when the electric meter is read and cannot be transferred during the middle of a billing cycle. In order for your request to be processed on your next meter read date, your request must be received at least 5 business days prior to the date on which the meter is read. To opt out, please call Clean Power Alliance at 888-585-3788 (TTY 323-214-1296) or visit [cleanpoweralliance.org](http://cleanpoweralliance.org). Please have your electric bill handy as you have the information needed to process the request.

**Failure to pay:** Clean Power Alliance may transfer your account to SCE upon 14 calendar days' written notice to you if you fail to pay any portion of the Clean Power Alliance charges on your bill. If your service is transferred, you may be subject to additional requirements by SCE. SCE's one-time account processing fee is subject to change. View SCE's fees at [www.sce.com/regulatory/tariff-books](http://www.sce.com/regulatory/tariff-books).

Access terms and conditions in other languages at [cleanpoweralliance.org](http://cleanpoweralliance.org)

# Clean Move-in Mailer



PO Box 13696  
Los Angeles, CA 90013

¡Aviso de su nuevo proveedor de electricidad, Clean Power Alliance! Ahora puede disfrutar de los beneficios de la energía limpia y renovable con tarifas competitivas.

來自您的新電力供應商「清潔電力聯盟」的通知！您現在能以具有競爭力的價格享受清潔、可再生電力的種種益處。

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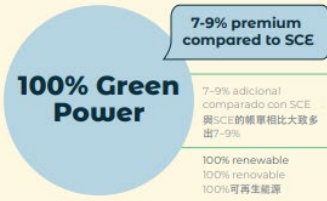
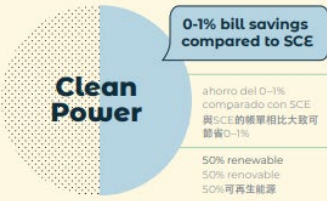
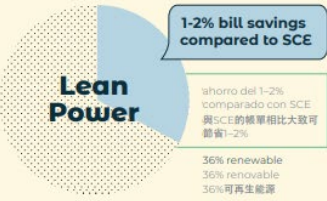
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**Enrollment:** You were automatically enrolled in Clean Power Alliance when you began electric service on this account.

**Discount Programs:** If you are currently enrolled in the California Alternative Rates for Energy (CARE) program, the Family Electric Rate Assistance (FERA) program, Medical Baseline, Level Pay or Summer Discount Program, you will continue to receive all benefits and discounts as a Clean Power Alliance customer.

**Opt out:** You have the right to opt out without penalty at any time. You will not be charged any fees by Clean Power Alliance if you opt out or if you cancel electric service altogether (for example, if you move). However, customers who opt out of Clean Power Alliance after service launch may be charged a one-time account processing fee by SCE (currently 50 cents), and will be presented by SCE from returning to Clean Power Alliance for a minimum of twelve months. By opting out, you will also be subject to SCE's then current rates and terms and conditions of service. For details on SCE's rates and terms and conditions, please visit [sca.com/nc](http://sca.com/nc). If you opt out, you will still be charged for all electricity you used before the transfer of electric service. Accounts will be transferred when the electric meter is read and cannot be transferred during the middle of a billing cycle. In order for your request to be processed on your next meter read date, your request must be received at least 5 business days prior to the date on which the meter is read. To opt out, please call Clean Power Alliance at 888-585-3788 (TTY 323-214-1296) or visit [cleanpoweralliance.org](http://cleanpoweralliance.org). Please have your electric bill handy so you have the information needed to process the request.

**Failure to pay:** Clean Power Alliance may transfer your account to SCE upon 14 calendar days' written notice to you if you fail to pay any portion of the Clean Power Alliance charges on your bill. If your service is transferred, you may be subject to additional requirements by SCE.

SCE's one-time account processing fee is subject to change. View SCE's fees at [www.sce.com/regulatory/for/#books](http://www.sce.com/regulatory/for/#books).

Access terms and conditions in other languages at [cleanpoweralliance.org](http://cleanpoweralliance.org)



# 100% Green Move in Mailers



PO Box 13696  
Los Angeles, CA 90013

## Notice from your new electricity provider, Clean Power Alliance!

You can now enjoy the benefits of clean, renewable power at competitive rates.



CPA's 100% Green Power is Green-e® certified. You'll be receiving an estimated 2020 resource mix of 60% solar and 40% wind power, all generated in CA.

Learn more at: [cleanpoweralliance.org/green-e](http://cleanpoweralliance.org/green-e)

To learn more, change your rate, or opt out, visit [cleanpoweralliance.org/rates](http://cleanpoweralliance.org/rates) or call us at 888-585-3788 (TTY 323-214-1296). Our call center speaks 26 languages!

¡Aviso de su nuevo proveedor de electricidad, Clean Power Alliance!  
Ahora puede disfrutar de los beneficios de la energía limpia y renovable con tarifas competitivas.

來自您的新電力供應商「清潔電力聯盟」的通知！您現在能以具有競爭力的價格享受清潔、可再生電力的種種益處。

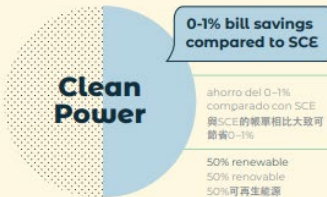
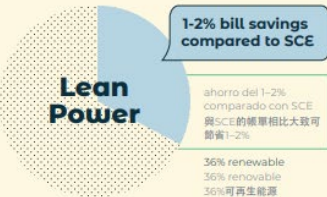
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Standard U.S.  
Postage  
Los Angeles, CA  
Permit No 2342

## Your Rate Options

Clean Power Alliance offers three competitively priced options for electricity at your home or business. Your city or county chose 100% Green Power as your default rate, but you can choose to change your rate or opt out and choose SCE as your energy supplier by visiting [cleanpoweralliance.org/rates](http://cleanpoweralliance.org/rates) or calling 888-585-3788.

**Sus opciones de tarifa** Clean Power Alliance ofrece tres opciones de electricidad con precios competitivos para su hogar o empresa. Su ciudad o condado escogieron 100% Green Power (Energía 100% Verde) como su tarifa predeterminada, pero puede optar por cambiar su tarifa u optar por dejar el servicio y escoger a SCE como su proveedor de energía visitando [cleanpoweralliance.org/rates](http://cleanpoweralliance.org/rates) o llamando al 888-585-3788.

您的費率方案 清潔電力聯盟為您住宅或企業提供三種價格具有競爭力的電力方案。貴市或貴縣選定100% Green Power (綠色電力) 作為您的預設方案，不過您可以透過造訪[cleanpoweralliance.org/rates](http://cleanpoweralliance.org/rates)或致電 888-585-3788。



Pricing shown above is for a typical residential or business customer. Select commercial rates may be higher. Please contact Clean Power Alliance for more information.  
Las tarifas arriba están para clientes residenciales o de negocio típicos. Algunas tarifas comerciales podrían ser más altas. Por favor, contacte a Clean Power Alliance para más información.  
下面列出的價格適用於一般住宅客戶或企業客戶。某些商業電費價格可能較高。如需更多信息，請聯繫清潔電力聯盟。

### Terms and Conditions of Service

Clean Power Alliance's electricity generation rates are competitive. Available rates can be reviewed at [cleanpoweralliance.org](http://cleanpoweralliance.org) or by contacting Clean Power Alliance at 888-585-3788 (TTY 323-214-1296). **Clean Power Alliance rates are subject to change and changes will be adopted at duly noticed public meetings of the Clean Power Alliance Board of Directors.**

Southern California Edison (SCE) collects from Clean Power Alliance customers authorized charges for delivering power to your home or business and for providing other services. These components of your electric bill are the same whether you buy electricity from Clean Power Alliance or SCE.

Southern California Edison also charges Clean Power Alliance customers a Power Charge Indifference Adjustment (PCIA) and a Franchise Fee Surcharge. Both are calculated based on the number of kilowatt hours used each month. The PCIA is intended to ensure that customers who switch to Clean Power Alliance pay for energy that was acquired by SCE to serve them prior to their switch. Note that Clean Power Alliance rates are competitive with SCE's rates, even with these fees.

**Billing:** Each month, Clean Power Alliance customers receive a single monthly bill from SCE, just as they would under SCE bundled service. This bill includes all electric charges, including Clean Power Alliance's power generation charges. SCE will continue to charge you for transmission and distribution services they provide; this includes the cost of transmitting electricity to your home or business.

**Enrollment:** You were automatically enrolled in Clean Power Alliance when you began electric service on this account.

**Discount Programs:** If you are currently enrolled in the California Alternative Rates for Energy (CARE) program, the Family Electric Rate Assistance (FERA) program, Medical Baseline, Level Pay or Summer Discount Program, you will continue to receive all benefits and discounts as a Clean Power Alliance customer.

**Opt out:** You have the right to opt out without penalty at any time. You will not be charged any fees by Clean Power Alliance if you opt out or if you cannot electric service altogether (for example, if you move). However, customers who opt out of Clean Power Alliance after service launch may be charged a one-time account processing fee by SCE (currently 50 cents\*), and will be prevented by SCE from returning to Clean Power Alliance for a minimum of twelve months. By opting out, you will also be subject to SCE's then current rates and terms and conditions of service. For details on SCE's rates and terms and conditions, please visit [scc.com](http://scc.com). If you opt out, you will still be charged for all electricity you use before the transfer of electric service. Accounts will be transferred when the electric meter is read and cannot be transferred during the middle of a billing cycle. In order for your request to be processed on your next meter read date, your request must be received at least 5 business days prior to the date on which the meter is read. To opt out, please call Clean Power Alliance at 888-585-3788 (TTY 323-214-1296) or visit [cleanpoweralliance.org](http://cleanpoweralliance.org). Please have your electric bill handy so you have the information needed to process the request.

**Failure to pay:** Clean Power Alliance may transfer your account to SCE upon 14 calendar days' written notice to you if you fail to pay any portion of the Clean Power Alliance charges on your bill. If your service is transferred, you may be subject to additional requirements by SCE.  
\*SCE's one-time account processing fee is subject to change. View SCE's fees at [www.scc.com/regulatory/tariff-books](http://www.scc.com/regulatory/tariff-books).

Access terms and conditions in other languages at [cleanpoweralliance.org](http://cleanpoweralliance.org)

## Project 2 Example: Net Energy Metering Letter



Locally powered energy innovation.

<Date>

<Customer Name>

<Mailing Address>

<Mailing City>, <Mailing State>, <Mailing Zip>

### Information Regarding Your Upcoming Annual Net Energy Metering True-Up

Dear Valued Customer:

Thank you for generating local renewable power!

Clean Power Alliance (CPA) will be conducting the annual settlement, or “true-up,” of your Net Energy Metering (NEM) account(s) during your April billing cycle. This letter describes the CPA NEM true-up process for your generation charges and credits.

When your NEM account(s) was enrolled in CPA, it was also automatically enrolled in CPA’s NEM program for your generation charges and credits. CPA is responsible for your monthly NEM electricity **generation service** charges and credits, while Southern California Edison (SCE) is responsible for your monthly NEM electricity **delivery service** charges and credits.<sup>1</sup> You are also eligible to receive Net Surplus Compensation for your excess clean energy production from CPA instead of SCE.

Annual true-up is a feature of the NEM program. CPA’s true-up process for your NEM generation charges is similar to the true-up process SCE conducts for your NEM delivery service charges. The CPA NEM true-up process determines if you are eligible for a cash-out payment or credit, and is conducted as follows:

- CPA will perform a NEM true-up of the most recent annual billing cycle (your “Relevant Period”) each April. Note that your true-up may be for a relevant period of greater than 12 months, if this is your first true-up.
- During the true-up process, CPA will determine if your account generated excess electricity and compensate you for that excess electricity at the current CPA Net Surplus Compensation rate<sup>2</sup>, **which is always 10% higher than SCE’s most recently published rate.**
- CPA will also conduct a settlement of any unused retail generation credits accumulated during the Relevant Period and you will be refunded those unused generation credits to offset previous energy charges you incurred during your Relevant Period.
- Since CPA bills NEM customers on a monthly basis for your net generation charges (charges for electricity use in excess of what you produced), you won’t ever owe money to CPA (beyond your normal monthly generation charges) as a result of your annual true up.

Based on this true-up process, you will experience one of the following four scenarios:

**Scenario 1: You are eligible for net surplus compensation only.** In this scenario you were a net producer during your relevant period, meaning that you produced more electricity than you used, and CPA will compensate you for that production at the current CPA Net Surplus Compensation rate.

**Scenario 2: You are eligible for a generation credit refund only.** In this scenario, though you were not a net producer during your relevant period, you had unused NEM generation credits remaining at the end of the relevant period. CPA will refund to you those unused NEM generation credits, up to the total value of any generation charges you paid over the course of the relevant period.

<sup>1</sup> Note that your SCE NEM delivery charges and credits may be true-up on a different billing cycle.

<sup>2</sup> Up to a maximum of \$10,000.

**Scenario 3: You are eligible for net surplus compensation and a generation credit refund.** In this scenario you were both a net producer and you had unused generation credits available to offset generation charges you paid earlier in the relevant period. Therefore, you will receive a combined payment or credit for these amounts.

**Scenario 4: You are not eligible for net surplus compensation or a generation credit refund.** In this scenario, you were not a net producer and you did not have any unused generation credits at the end of the relevant period. Nothing happens and your new relevant period begins.

If the combined value of your net surplus compensation and/or generation credit refund is \$100 or greater, CPA will mail you a check for that amount.<sup>3</sup> If the combined value of your net surplus compensation and/or generation credit refund is less than \$100, CPA will carry those funds forward on your account as a credit, the dollar value of which will be applied to future monthly generation charges. Your net kilowatt-hour balance will be reset to zero for your new CPA 12-month Relevant Period, which will begin on your April 2021 meter read date.

If you are issued a check, it will be valid for 90 days. If your check expires, the amount of your cash out will be applied to your bill as a rollover credit.

If you have other commercial or residential CPA NEM accounts, depending on their date of enrollment those accounts may not be trued-up this April and you will receive additional communication.

Additional information regarding CPA's NEM program can be found at [www.cleanpoweralliance.org/nem](http://www.cleanpoweralliance.org/nem).

**About Clean Power Alliance (CPA)**

CPA is the locally controlled electricity provider for your area. We are proud to bring clean, renewable power choices to communities across Los Angeles and Ventura Counties at stable, competitive rates. CPA procures your electricity generation while SCE delivers your power, sends your bill, and is responsible for resolving any electricity service issues. To learn more about CPA and our NEM program, please contact us at 888-585-3788 (TTY 323-214-1296) or at [customerservice@cleanpoweralliance.org](mailto:customerservice@cleanpoweralliance.org).

If you have any questions regarding SCE's service or NEM program, please contact SCE's Customer Contact Center at 800-655-4555, or visit their website at [www.sce.com/nem](http://www.sce.com/nem).

Sincerely,

Account Services  
Clean Power Alliance

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<sup>3</sup> Contingent upon CPA receiving all necessary data to conduct true-up.



# Project 3 Example: Joint Rate Comparison



PO Box 13696  
Los Angeles, CA 90013



Presorted  
Standard U.S.  
Postage  
**PAID**  
Los Angeles, CA  
Permit No 2342

## Your power choices.

Choose the energy source and rate plan that's right for you.

This is an annual mailer from Clean Power Alliance and Southern California Edison (SCE) that allows you to compare your rate choices and the sources of your energy and select the option that best suits you or your family.

For more information: call Clean Power Alliance at 888-585-3788 or visit [cleanpoweralliance.org](http://cleanpoweralliance.org), or call SCE at 800-974-2356 or visit [sce.com/cca](http://sce.com/cca).

## Understanding your energy choices.

The purpose of this mailer is to help you make a comparison between Clean Power Alliance and SCE rates and see the renewable energy mix of each to decide which service and rate works for you. The charts below illustrate the estimated electricity costs for a typical residential customer within Clean Power Alliance's service territory with an average monthly energy use of 533 kilowatt hours (kWh). This comparison is based on Clean Power Alliance rates approved by the Board of Directors and effective as of May 11, 2020. SCE rate options are based on rates effective April 13, 2020. Both Clean Power Alliance and SCE's rates are subject to change.

2020 Domestic Schedule Rate Comparison	SOUTHERN CALIFORNIA EDISON®			CPA CLEAN POWER ALLIANCE		
	SCE Base rate	SCE Green Rate 50% renewable	SCE Green Rate 100% renewable	Lean Power 36% renewable	Clean Power 50% renewable	100% Green Power 100% renewable
Generation Rate (\$/kWh)	\$0.09609	\$0.08832	\$0.08056	\$0.06989	\$0.07181	\$0.08910
SCE Delivery Rate (\$/kWh)	\$0.12309	\$0.12309	\$0.12309	\$0.11729	\$0.11729	\$0.11729
Surcharges (\$/kWh)	\$0.00000	\$0.01169	\$0.02338	\$0.03003	\$0.03003	\$0.03003
Total Costs (\$/kWh)	\$0.21918	\$0.22310	\$0.22703	\$0.21721	\$0.21913	\$0.23642
Average Monthly Bill (\$) Monthly Usage: 533 kWh	\$116.82	\$118.91	\$121.01	\$115.77	\$116.80	\$126.01

Monthly Usage: 533 kWh

SCE rates current as of April 2020, CPA rates current as of May 2020.

SCE's 50% and 100% rates are open to all customers subject to participation caps. CPA's 50% and 100% rates are open to all customers.

**Generation Rate** reflects the cost of producing or purchasing electricity to power your home. This rate will vary depending on your service provider and rate plan.

**SCE Delivery Rate** is a charge assessed by SCE to deliver electricity to your home. This rate depends on usage.

**Surcharges** represent the Cost Responsibility Surcharge (CRS) and Franchise Fee (FF) that are applicable to Community Choice Aggregation (CCA) customers and SCE customers that elect a Green Rate. The CRS is a surcharge to recover costs associated with power purchases made on behalf of customers, prior to a customer's switch to a CCA or SCE Green Rate. The FF recovers taxes owed to a city in exchange for allowing SCE to utilize electrical distribution lines throughout the property of the city. SCE acts as the collection agency for the FF surcharge which is levied by cities and counties for all customers.


Electric Power Generation Mix*	SOUTHERN CALIFORNIA EDISON®			CPA CLEAN POWER ALLIANCE		
	SCE (Base)	SCE Green Rate (50%)	SCE Green Rate (100%)	Lean Power	Clean Power	100% Green Power
Specific Purchases	Percent of Total Retail Sales (kWh)					
Renewable	35%	67.5%	100%	36%	51%	100%
Biomass & biowaste	0.6%	0.3%	0%	12%	3%	7%
Geothermal	5.9%	3%	0%	0%	2%	10%
Eligible hydroelectric	1%	0.5%	0%	2%	5%	0%
Solar	16%	58%	100%	8%	15%	73%
Wind	11.4%	5.7%	0%	14%	26%	10%
Coal	0%	0%	0%	0%	0%	0%
Large hydroelectric	6.3%	3.2%	0%	0%	13%	0%
Natural gas	19.3%	9.7%	0%	0%	0%	0%
Nuclear	8.2%	4.1%	0%	0%	0%	0%
Other	3.3%	1.7%	0%	0%	0%	0%
Unspecified Power**	28%	14%	0%	64%	36%	0%
Total	100%	100%	100%	100%	100%	100%

\* Generation data for SCE and CPA represents preliminary 2019 data provided through the California Energy Commission's Power Source Disclosure program.

\*\* Unspecified sources of power mean electricity from transactions that are not traceable to specific generation sources.


If you want to find out which rate you are on or if you have further questions, please contact Clean Power Alliance at [cleanpoweralliance.org](http://cleanpoweralliance.org) or (888) 585-3788 and SCE at [sce.com/cca](http://sce.com/cca) or (800) 974-2356.

## Project 4 Example: Default Change Notice



CPA CLEAN POWER ALLIANCE

PO Box 13696  
Los Angeles, CA 90013



Presorted Standard  
U.S. Postage  
**PAID**  
Los Angeles, CA  
Permit No 2342

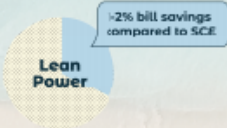
### A notice from Clean Power Alliance and the City of Malibu to Malibu customers.

As of **October 2020**, you will start to receive 100% Green Power. You can change your rate at any time.


#### Your Rate Options

Rate comparisons for a typical residential or business customer.

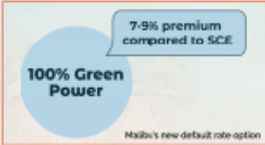
*Select commercial rates may be higher.*



**Lean Power**  
2% bill savings compared to SCE



**Clean Power**  
0-1% bill savings compared to SCE



**100% Green Power**  
7-9% premium compared to SCE  
Malibu's new default rate option

**CleanPower Alliance** has been the electricity provider for the City of Malibu and 31 other communities since 2019. It purchases clean, renewable energy on behalf of its customers. The Clean Power Alliance provides green power which reduces air pollution and greenhouse gas emissions while creating jobs by funding the development of new clean energy options.


**What changes are coming?** The Malibu City Council voted in 2019 to adopt the Clean Power Alliance's 100% Green Power as the default rate for Malibu starting October 2020 to reduce the impacts of climate change and air pollution. You can change your rate at any time by calling 888-585-3788 or visiting [cleanpoweralliance.org/rates](https://cleanpoweralliance.org/rates).

**What will it cost?** 100% Green Power costs 7-9% more than SCE's default rate for most customers. Residential customers enrolled in CARE, FERA or Medical Baseline will NOT pay this premium. If not you're not already enrolled, check your eligibility and apply through SCE by visiting [sce.com/care](https://sce.com/care) or calling 800-798-5723.

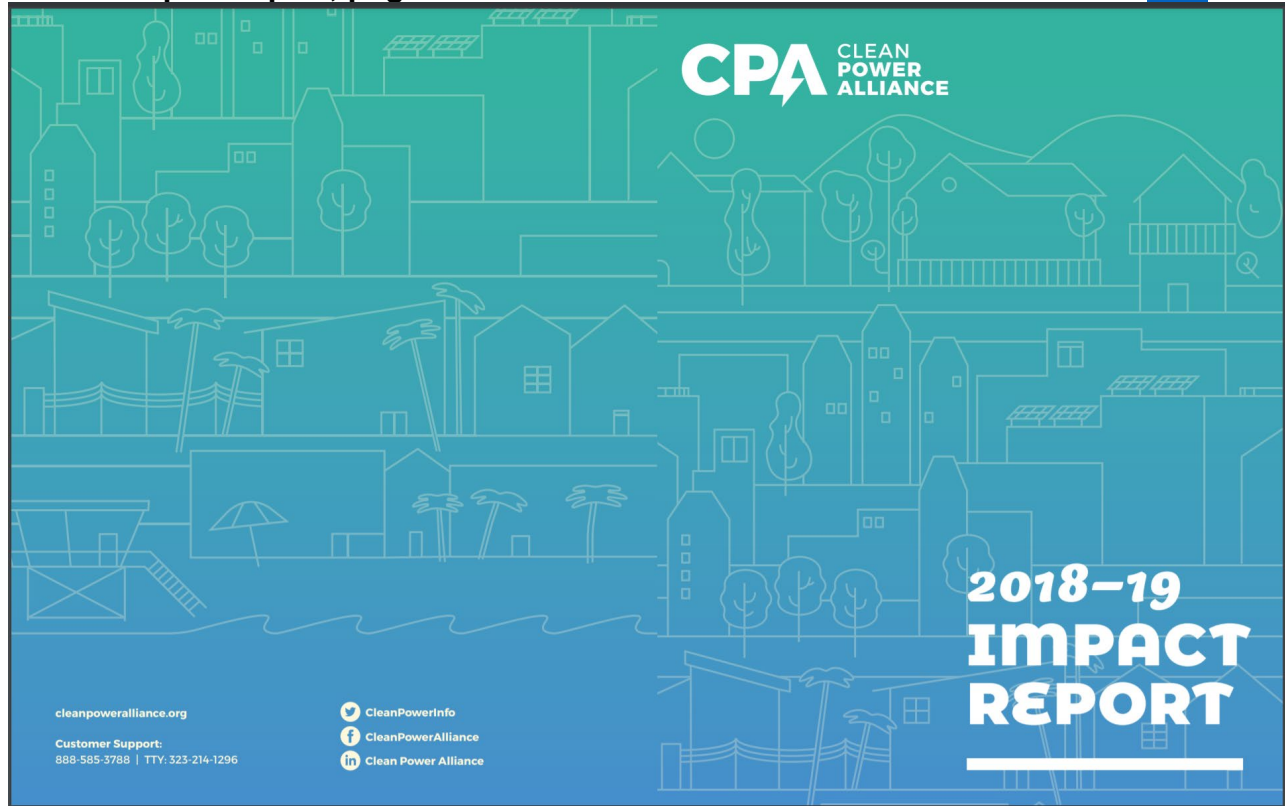
**Want a different rate?** No problem! You can change your rate at no cost by selecting: Lean Power (36% renewable energy) or Clean Power (50% renewable energy). Compare your Clean Power Alliance and SCE rate options at [cleanpoweralliance.org/compare](https://cleanpoweralliance.org/compare).

For terms and conditions regarding your Clean Power Alliance service, please visit [cleanpoweralliance.org/terms-and-conditions](https://cleanpoweralliance.org/terms-and-conditions).

To learn more or change your rate, visit [cleanpoweralliance.org](https://cleanpoweralliance.org) or call 888-585-3788 (TTY 323-214-1296).



**Additional Example of Potential CPA Printing Need:**  
Annual impact report, page 1 of 16. The full document is on CPA's website [here](#).



## ATTACHMENT I

### Affirmation of Ability to Meet the Qualifications and Experience and the Scope of Services

By checking all applicable boxes and signing this form, I affirm our ability to meet the qualifications, experience, and the Scope of Services identified below. Please check all applicable boxes.

**Qualifications and Experience (Printing):**

- Ability to print jobs of 800,000 pieces over a four-week period.
- Affirm ability and willingness to execute a Non-Disclosure Agreement, to adhere to policies that protect customer data privacy, and to sign acknowledgments complying with such policies as they may be amended from time to time.
- Availability to complete critical print jobs in accordance with the following expected term:

Expected Quantity	Expected Term
75,000 customer notifications approximately every three months.	Throughout the year
500,000 customer notifications printed in a maximum of one month.	To be mailed in June and September 2022. In any subsequent years June and September of every calendar year.
60,000 customer notifications printed in a maximum of two weeks.	To be mailed in September 2021, and November 2021 and in September and November of any subsequent calendar years, but the mailer amounts may vary.
50,000 customer letters printed in a maximum of two weeks.	To be mailed in April every year.

Preferred (optional):

- Experience working with a CCA or a local government agency on customer notifications.

List CCA or agency name(s): \_\_\_\_\_

**Qualifications and Experience (Mailing):**

- Ability to complete mail jobs of 800,000 pieces over a four-week period.
- Ability to receive mailing lists from CPA's data management vendor in tilde delimited txt format sent via SFTP. Our data management vendor or the mailing vendor can host SFTP.
- Affirm ability and willingness to execute a Non-Disclosure Agreement, to adhere to policies that protect customer data privacy, and to sign acknowledgments complying with such policies as they may be amended from time to time.
- Availability to complete critical mailing jobs in accordance with the following expected term:

Expected Quantity	Expected Term
5,000 customer notifications mailed/week.	Throughout the year
500,000 customer notifications mailed over a maximum of two weeks.	To be mailed in June and September 2022. In any subsequent years June and September of every calendar year.
60,000 customer notifications mailed over a maximum of two weeks.	To be mailed in September 2021, and November 2021 and in September and November of any subsequent calendar years, but the mailer amounts may vary.
50,000 customer letters mailed over a maximum of two weeks.	To be mailed in April every year.

Preferred (optional):

- Experience working with a CCA or a local government agency on customer notifications.

List CCA or agency name(s): \_\_\_\_\_

Scope of Services:

- ❑ **Printing Services: Printing Services, including but not limited to:**
  - Print up to 200,000 pieces per weekly batch.
  - Print in formats including letters, postcards, bifold, or others, as CPA may determine from time to time.
  - Sourcing and printing on a percentage recycled paper, as decided by CPA or as revised by CPA from time to time.

Deliverables:

  - Printing must be completed within the time specified in the Order Form (**Attachment F**).
  - Vendor should submit a proof of each notice to CPA within 3 business days, if not sooner, for CPA review and approval.
  
- ❑ **Mailing Services: Mailing Services, including but not limited to:**
  - Review and provide a report of National Change of Address.
  - Mail notices, either via bulk and standard mailing, as directed by CPA or as revised from time to time.
  - Sign non-disclosure agreements for handling sensitive customer data, sign acknowledgments of CPA's privacy and confidentiality policies, renew such acknowledgments, if amended from time to time (see **Attachment G**).

Deliverables:

  - Report of National Change of Address must be provided upon request.
  - Confirmation that the notices have been mailed must be sent to CPA within 1 business day of the mailing.
  - NDAs and acknowledgments must be executed at the time of contract execution.
  - Mail all move-in mailers within one week of receipt of the weekly mailing lists provided by CPA or its designee.
  - For mailing services only, must use CPA's mailing permit for Business Mail Entry Unit 7001 S Central Ave RM 210, Los Angeles CA 90052-9614 or must propose use of Proposer's mailing permit that lists an area in CPA's service territory on the indicia. CPA will not allow the use of an indicia without a city, county, or zip code listed or an indicia that lists a city, county, or zip code outside of CPA's service territory.
  
- ❑ **Printing and/or Mailing Services: Tracking and Reporting of Progress and Costs, including but not limited to:**
  - Track and report on progress of projects from initial proof and/or through delivery to post office.
  - Track and report on printing costs and or postage monthly with itemized breakdown.

Deliverables:

  - Report of progress of projects must be provided within 1 business day of request.
  - Report on printing costs and or postage must be provided on a monthly basis.
  
- ❑ **Printing and/or Mailing Services: Other ad hoc printing and or mailing of program collateral, including but not limited to:**
  - Printing and or mailing of other notices, including but not limited to CPA program collateral.

Deliverables:

  - Report of progress of projects must be provided within 1 business day of request.
  - Vendor will be expected to submit a proof of each notice to CPA within 3 business days, if not sooner.

Name (Print): \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_



**ATTACHMENT J**  
**Pricing Form**

Project	Format	Paper	Anticipated Quantities	Estimated Cost for Printing	Estimated Cost for Mailing
1	<ul style="list-style-type: none"> <li>• Full color</li> <li>• Double-sided postcard</li> <li>• 6 x 10.5</li> <li>• Printed address</li> </ul> <p><i>30,000 printed at once, but three batches addressed and mailed weekly to new move-in customers approximately 5,000/week.</i></p>	30% recycled 100-130lb Silk cover	30,000		
		10% recycled 100-130lbsilk cover			
		100% recycled 100-130lb silk cover			
2	<ul style="list-style-type: none"> <li>• Full color</li> <li>• Single page one-sided letter</li> <li>• 8.5 x 11</li> <li>• Regular #10 envelope with printed address (please specify recycle content % used for quote)</li> </ul>	30% recycled 24 - 60 lb.	50,000		
		10% recycled 24 – 60 lb.			
		100% recycled 24 – 60 lb.			
3	<ul style="list-style-type: none"> <li>• Full color</li> <li>• Double-sided postcard</li> <li>• 6 x 10.5Printed address</li> </ul> <p><i>500,000 must be printed within one month.</i></p>	30% recycled 100-130lb.silk cover	500,000		
		10% recycled 100-130lb silk cover			
		100% recycled 100-130lb silk cover			
4	<ul style="list-style-type: none"> <li>• Full color</li> <li>• double-sided postcard</li> <li>• 6 x 10.5Printed address</li> </ul>	30% recycled 100-130lb silk cover	60,000		
		10% recycled 100-130lb silk cover			
		100% recycled 100-130lb silk cover			
5	Pricing to produce one National Change of Address (NCOA) report. CPA expects to request NCOA reports up to 5 times per calendar year. If discounts are available for a larger volumes of reports, please describe the discount.				