

VALLEY CLEAN ENERGY ALLIANCE

Staff Report – Item 11

To: Valley Clean Energy Alliance Board of Directors

From: Mitch Sears, Interim General Manager
Rebecca Boyles, Director of Customer Care and Marketing

Subject: Amendment 20 Task Order 2 of the SMUD Professional Services Agreement

Date: October 8, 2020

RECOMMENDATION

Adopt a resolution authorizing the Interim General Manager to sign Amendment 20 to Task Order 2 of the Sacramento Municipal Utilities District (SMUD) Professional Service Agreement for the implementation of the 2019 California Energy Commission Power Content Label email scope at a cost of \$3,500.

BACKGROUND

On October 12, 2017 the VCE Board approved a Professional Services Agreement with the Sacramento Municipal Utility District (SMUD) and Task Orders 1 and 2 to provide program launch and operational services. Soon thereafter, a series of additional Task Orders were implemented to the Agreement, including Task Order 3 to provide Wholesale Energy Services; Task Order 4 to provide Operational Staff Services to VCE; and Task Orders 5 (Long Term Renewable Procurement Services) and 6 (Expansion of VCE Service to Winters, CA).

VCE is required to send the 2019 Power Content Label (PCL) to all customers by December 31, 2020. In an effort to reduce paper consumption, VCE intends to email the PCL to its customers where email addresses are available using SMUD's Customer Relationship Management (CRM) database. And, it is VCE's intent to use the CRM email functionality for future email campaigns.

Amendment 20 to SMUD agreement Task Order 2 (Data Management and Customer Call Center Services) authorizes the configuration of SMUD's Customer Relationship Management (CRM) system to enable the functionality to send the 2019 PCL via email to VCE's customers at a cost of \$3,500.

Financial Impact: In 2019, VCE expended approximately \$13,800 on printing and mailing the 2018 PCL to our approximate 45,000 customers. Since November 2019, VCE has added customers with the addition of Net Energy Metering customers. The cost for SMUD to implement the PCL email scope is \$3,500, though some of the financial impact to VCE will be mitigated by reduced printing costs. This cost has been budgeted in the FY2020/2021 operating budget.

CONCLUSION

Staff is recommending the VCE Board adopt the attached resolution authorizing the Interim General Manager to sign Amendment 20 to Task Order 2 (Data Management and Customer Call Center Services).

Attachments:

1. Amendment 20 to Task Order 2 (Data Management and Customer Call Center Services)
2. Resolution Authorizing Interim General Manager to sign Amendment 20 to Task Order 2 to the VCE-SMUD Professional Services Agreement

AMENDMENT 20 TO EXHIBIT A: Scope of Services**A.4 Task Order 2 – Data Management and Customer Call Center Services**

SMUD and VCEA agree to the following services, terms, and conditions described in this Amendment 20 to Exhibit A, Task Order No. 2 (Amendment 20), the provisions of which are subject to the terms and conditions of the Master Professional Services Agreement (Agreement) between the Parties. If any specific provisions of this Amendment 20 conflict with any general provisions in the Agreement or Task Order 2, the provisions of this Amendment 20, shall take precedence. Capitalized terms used in this Amendment which are not defined in this Amendment will have the respective meanings ascribed to them in the Agreement or a previous Amendment thereof.

The Effective Date of this Amendment 20 is the date of last signature below.

1. Section 1, SCOPE OF WORK, is amended to add Section 1.11 below:**“1.11 POWER CONTENT LABEL EMAIL FUNCTIONALITY****1.11.1 Scope of Work**

VCE is required to send the 2019 Power Content Label (PCL) to all enrolled customers by December 31, 2020. In an effort to reduce paper consumption, VCE intends to email the PCL to customers where email addresses are available in CRM. The CRM email functionality enabled through this technology enhancement will also support future email campaigns.

To implement the power content label email scope, SMUD will:

- Enable functionality to send emails to customers from an @valleycleanenergy.org email address.
- Work with VCE to create an email template including embedded graphics and text.
- Test PCL email with VCE staff prior to distribution to customers.
- Develop a list of customers with email addresses stored in CRM.
- Send emails to customers in increments of 5,000 per day on a schedule to be agreed upon with VCE and coordinated with the standard PCL mailer timeline.

1.11.2 Deliverables and Due Dates

The schedule for the power content label email is estimated to be four (4) weeks, and includes the following milestones and due dates:

	Milestone	Responsible Party	Due Date
1	Task Order Amendment executed	VCE	October 28, 2020
2	Configuration and testing complete	SMUD	November 18, 2020
3	Customer list developed, ready to begin email distribution at VCE request	SMUD	November 25, 2020

SMUD is prepared to maintain schedule flexibility, as the email graphics are dependent on the California Energy Commission making the PCL template available to Load Serving Entities.

1.11.3 Schedule

It is estimated that the Scope of Services in this task will be completed in four (4) weeks from the Amendment execution due date of this Amendment 20, and SMUD will implement the technical solution by the end of November 2020.”

Section 4, COMPENSATION FOR SERVICES is amended to add Section 4.7, *Power Content Label Email Functionality*, as follows:

“The fixed fee for the Implementation of the 2019 power content label email is \$3,500.”

Section 5, PAYMENT TERMS, is amended to add the following:

“SMUD will invoice the fixed fee for the Implementation of the 2019 power content label email upon completion, and payment will be due net thirty (30) days from date of the invoice.”

[Signature Page follows]

SIGNATURES

The Parties have executed this Amendment 20, and it is effective as of the date of last signature below.

Valley Clean Energy Alliance

By: _____

Name: _____

Title: _____

Date: _____

Approved as to Form: N/A _____

Sacramento Municipal Utility District

By: _____

Name: _____

Title: _____

Date: _____

Approved as to Form: _____

VALLEY CLEAN ENERGY ALLIANCE

RESOLUTION NO. 2020-___

**A RESOLUTION OF THE VALLEY CLEAN ENERGY ALLIANCE APPROVING AMENDMENT 20
TO TASK ORDER 2 TO THE SACRAMENTO MUNICIPAL UTILITIES DISTRICT
PROFESSIONAL SERVICES AGREEMENT AND AUTHORIZING INTERIM GENERAL
MANAGER TO SIGN**

WHEREAS, the Valley Clean Energy Alliance (“VCE”) is a joint powers agency established under the Joint Exercise of Powers Act of the State of California (Government Code Section 6500 et seq.) (“Act”), and pursuant to a Joint Exercise of Powers Agreement Relating to and Creating the Valley Clean Energy Alliance between the County of Yolo (“County”), the City of Davis (“Davis”), the City of Woodland and the City of Winters (“Cities”) (the “JPA Agreement”), to collectively study, promote, develop, conduct, operate, and manage energy programs;

WHEREAS, on August 31, 2017, the VCE Board considered a proposal by the Sacramento Municipal Utilities District (“SMUD”) to provide program launch and operational services and subsequently directed VCE staff to negotiate a services agreement between VCEA and SMUD for consideration and action by the VCEA Board;

WHEREAS, on September 21, 2017, the SMUD Board of Directors authorized its CEO to enter into a contract with VCE to provide Community Choice Aggregate (CCA) support services;

WHEREAS, On October 12, 2017 the VCE Board approved the Master Professional Services Agreement and Task Order 1 (technical and analytical services) and Task Order 2 (Data Management and Call Center Services) to provide program launch and operational services consistent with the SMUD proposal and VCE Board direction;

WHEREAS, in October 2018, Amendment 4 to Task Order 2 updating VCE’s base program from “LightGreen” to “Standard Green” was approved;

WHEREAS, in April 2019, Amendment 10 to Task Order 2 adding detail to SMUD’s invoicing methodologies in the Compensation for Services section updating was approved;

WHEREAS, in June 2019, Amendments 11 and 12 to Task Order 2 implementing the Annual Dividend program and second Net Energy Metering (NEM) True-Up Policy was approved;

WHEREAS, in August 2019, Amendment 13 to Task Order 2 updating data management and customer call center service rate was approved;

WHEREAS, on May 14, 2020, Amendment 16 to Task Order 2 authorizing the configuration of VCE’s billing system to enable vintage year specific rates was approved;

WHEREAS, in July 2020, the Board received a signed copy by VCE’s Interim General Manager of Amendment 18 to Task Orders 2, 3 and 4 increasing the billable hourly rates by 2.0% effective July 1, 2020;

WHEREAS, on an annual basis, VCE is required to send a Power Content Label (PCL) to all customers;

WHEREAS, in an effort to reduce paper consumption, VCE intends to email the PCL to customers where email addresses are available using SMUD’s Customer Relationship Management (CRM) platform; and,

WHEREAS, VCE would also like to use CRM email functionality for future email campaigns.

NOW, THEREFORE, the Board of Directors of the Valley Clean Energy Alliance resolves as follows:

1. Approve Amendment 20 to Task Order 2 (Data Management and Call Center Services) authorizing SMUD to implement the 2019 California Energy Commission Power Content Label email scope at a cost of \$3,500; and,
2. Authorize Interim General Manager to sign Amendment 20.

PASSED, APPROVED AND ADOPTED, at a regular meeting of the Valley Clean Energy Alliance, held on the ____ day of _____, 2020, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

Don Saylor, VCE Chair

Alisa M. Lembke, VCEA Board Secretary

Attachment: EXHIBIT A - Amendment 20 to Master Professional Services Agreement Task Order 2

EXHIBIT A

AMENDMENT 20 TO TASK ORDER 2 (DATA MANAGEMENT AND CALL CENTER SERVICES)