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# California Choice Energy Authority Request for Proposals for Lobbyist Services

## **Overview**

California Choice Energy Authority (“CalChoice”) is seeking proposals for lobbyist services to commence as soon as possible, but most likely not until the end of April 2020, and continuing through October 31, 2020. The selected lobbying firm or independent contractor (“Contractor”) will work directly with CalChoice representatives, including third party consultants and the Member leadership (i.e., executive city management, and city council members).

## **General Information**

CalChoice is a California Joint Powers Authority (“JPA”) that provides California Choice Aggregation (“CCA”) support services, which include energy portfolio management, power procurement and trading, settlements and invoice validations, regulatory compliance, regulatory advocacy, financial and accounting, and rate-setting support functions. Furthermore, CalChoice provides a turn-key CCA offering to other city-specific CCA programs and has therefore been tasked with administering this Request for Proposals (“RFP”) on behalf of the CalChoice Member cities. The CalChoice Members that currently offer CCA service within their jurisdictions include:

- Town of Apple Valley
- City of Lancaster
- City of Pico Rivera
- City of Rancho Mirage
- City of San Jacinto

Considering that California energy policy and legislation continues to dramatically change at a rapid pace, CalChoice now, and more than ever, understands that it needs to protect its Member’s interests in Sacramento, which will require the expertise of an experienced and effective Contractor.

## **CalChoice Legislative Involvement**

CalChoice follows and monitors California legislative activity; however, CalChoice has historically not been directly engaged on legislative matters such as supporting opposing, or proposing legislation and regulations for the benefit of the its membership when related to issues of concern to the five operational CCA programs. The CalChoice

Members are particularly interested in legislation, legislative reform, and/or regulation in the areas of energy policy, which includes, but is not limited to, California's Renewable Portfolio Standards ("RPS") program, Resource Adequacy ("RA") program, Integrated Resource Plan ("IRP") program, Investor Owned Utility ("IOU") rate matters that impact the competitiveness of the CalChoice Member CCA programs, transportation electrification, and any matters that threaten a CCA's ability to self-procure its energy resources and set its own retail electric rates.

### **Scope of Services**

CalChoice is seeking a Contractor to provide services which include but is not limited to the implementation of a strategy that includes monitoring the Legislature, Governor's Office, and pertinent state agencies; coordination with allied interest; and direct advocacy and lobbying activities including:

- Actively monitor legislation in the areas of energy policy, which includes, but is not limited to, California's RPS program, RA program, IRP program, IOU rate-setting matters that impact the competitiveness of the CalChoice Member's CCA programs, and any matters that threaten a CCA's ability to self-procure its own energy resources and set its own retail electric rates.
- Provide timely intelligence reports on key issues including, but not limited to weekly reports during the legislative session on key legislative bills that are being monitored by CalChoice. This report would include the bill number and name, author, a brief summary, an update detailing any amendments, bill status, the position taken by the CalChoice, and positions taken by any of our coalition partners, or other prominent stakeholders.
- Routinely advise CalChoice of the status of legislation in areas of interest via oral and written reports.
- Under the direction of CalChoice, serve as the catalyst for legislation that would provide for reforms in the areas of energy policy, which includes, but is not limited to, California's RPS program, RA program, IRP program, IOU rate-setting matters that impact the competitiveness of the CalChoice Member's CCA programs, and any matters that threaten a CCA's ability to self-procure its own energy resources and set its own retail electric rates.
- Attend periodic meetings with CalChoice and its Members.
- Draft and submit letters to the appropriate legislator(s) and legislative body setting forth CalChoice's position on bills.
- Testify before legislative committees and draft testimony for CalChoice representatives and prepare them to testify when they are scheduled to appear before legislative committees.
- Arrange meetings with Capitol decision-makers and legislative staff.
- Draft legislation and legislative amendments and identify sponsors for legislation.
- Coordinate coalitions with public entity partners and others in support of specific legislative outcomes.
- Coordinate with allied interests (e.g. publicly owned utilities, community-based

- organizations, other CCAs, CalCCA, and various other affiliate groups).
- Assist in identifying data to be collected and analyzed in support of or in opposition to pending legislation.
  - Assist in the development of position papers on pending legislation, including research and analysis of potential impact to CalChoice Members.
  - Work with the administration to secure support for legislative proposals favorable to CalChoice's interests and opposition to legislation detrimental to CalChoice's interests.
  - Such other services as CalChoice and the Contractor may agree to.

### **Proposal Requirements**

All proposals shall be submitted in electronic form (Word or pdf) to Cathy DeFalco via email at [cathy@calchoice.org](mailto:cathy@calchoice.org). Proposals must be received by 5:00 p.m. PST on Wednesday, March 25, 2020. Late proposals will not be considered. All proposals shall include the following information in the order listed below:

1. The background on your firm and identification (including resumes) of the personnel to be involved in the account. Identify specifically who will be primarily serving as the 'face' of CalChoice to legislators.
2. A list of all energy companies (e.g., municipal electric companies) that you have provided services for within the past five (5) years.
3. A list of all CCA clients that you have provided services for within the past five (5) years.
4. For the personnel who will be primarily working on this account, a list of all other clients that are currently being served.
5. A sample of the reports that would be provided to CalChoice regarding legislative bills.
6. Acknowledgement that the attached draft Professional Services Agreement, including insurance requirements is acceptable, or proposed revisions to the Professional Service Agreement.
7. A clear outline of the total cost for providing lobbying services **per month** through October 31, 2020. If certain services will cost additional amounts, please provide a list of such additional services and amounts.
8. A clear outline of the total cost for providing lobbying services **per month** through December 31, 2021. If certain services will cost additional amounts, please provide a list of such additional services and amounts.
9. A list of references, including name, company, telephone number, and email address. This list should state how long the Contractor has provided services to the reference and a brief summary of the scope of services provided. Please also include a contact for an entity that is no longer engaged by the Contractor.

10. Provide one example of a defensive effort to kill or amend legislation that was averse to the mission of your client that was successful during the past three legislative sessions.

All questions about this RFP should be submitted via email to Cathy DeFalco via email at [cathy@calchoice.org](mailto:cathy@calchoice.org) on or before March 20, 2020. This proposal may be found at [CaliforniaChoiceEnergyAuthority.com](http://CaliforniaChoiceEnergyAuthority.com).

### **Award of Contract**

CalChoice reserves the right to reject any and all proposals submitted, and to award to the Contractor, in its sole opinion, that best meets the needs of CalChoice and its Members. Selection criteria will include: (1) Experience of firm and personnel; (2) Pricing; (3) Responsiveness to the Request for Proposal; and (4) References. The selection process may include an in-person, video conference, or teleconference interview with Contractor representatives and Members of CalChoice in early April 2020. A decision is anticipated by early April. CalChoice expects to expeditiously finalize the attached Professional Service Agreement terms, and present the agreement for approval to the CalChoice Board in late April