

REQUEST FOR PROPOSALS
For
Orange County Power Authority

Printing and Mailing Services 2022 through 2023

Solicitation Number: 22-001

RESPONSE DUE
by
5:00 p.m.
on
June 13, 2022

For complete information regarding this project, see RFP posted at www.ocpower.org or contact the OCPA representative listed below.

Thank you for your interest!

SHalligan@ocpower.org

A. GENERAL REQUEST

Orange County Power Authority (OCPA) is seeking proposals from qualified firms (“Consultant”) to provide print and mailing services including bulk-postage rate capabilities.

1. BACKGROUND

OCPA was created as a California Joint Powers Authority (JPA) on November 20, 2020, as a Community Choice Aggregator (CCA) in Orange County. OCPA provides several benefits to its participating customers including:

- Providing electric power at competitive costs with reduced carbon emissions
- Procuring energy with a priority on the use and development of local renewable resources
- Stimulating local job creation through various program development
- Promoting personal and community ownership of renewable resource
- Stabilizing long-term electricity rates for residents and businesses

OCPA is governed by a board of directors (Board) consisting of elected representatives from each participating jurisdiction. The JPA authorizes OCPA with the rights and powers to set rates for the services it furnishes, incur indebtedness, and issue bonds or other obligations. OCPA serves the cities of Buena Park, Fullerton, Huntington Beach, Irvine, and the Unincorporated areas of Orange County.

OCPA began providing electricity supply services to commercial, industrial, and municipal customers in April of 2022. In October 2022, OCPA will begin to serve residential customers.

2. TERM OF AGREEMENT

The initial term of the Agreement(s) shall be for one year. OCPA reserves the right to extend the agreement(s) for two additional years.

3. MINIMUM CONSULTANT QUALIFICATIONS

All proposers should have a valid business license for the City in which they operate.

All proposers should be able to show the following minimum insurance requirements will be maintained through the duration of the project:

- \$1,000,000 of Commercial General Liability and a general aggregate limit of \$2,000,000 per project or location
- \$1,000,000 of Automobile Liability for any owned, non-owned, or hired vehicle to be used in connection with the performance of this project
- \$1,000,000 of Worker’s Compensation as required by the State of California
- \$2,000,000 of Professional Liability/Errors & Omissions

B. SERVICES REQUESTED

1. SCOPE OF WORK TO BE PERFORMED

Below is an outline of anticipated printing and mailing needs including details to help inform the cost estimates for each item. Also included is a 20% contingency budget to cover unanticipated printing and mailing needs. **Deliverables include printing, delivering and postmarking all mailers, as well as printing and facilitating the delivery of all brochures, fact sheets, information cards, business cards, and any miscellaneous print collateral.**

Required Mailers

Description	Date Mailed	Style	Estimated Number of Units
Pre-Enrollment Notice #1	August 1, 2022	6"x11" color, double sided glossy postcard	271,000
Courtesy Letters	August 29, 2022	8"x11" double sided color letters in windowed B&W envelopes	19,000
Pre-Enrollment Notice #2	September 2, 2022	8.5"x14" color, single sided legal letters in standard B&W envelopes	271,000
Post-Enrollment Notices*	Mid October through December	6"x11" color, double sided glossy postcard	542,000
Joint Rate Comparison	January 2023	6"x11" color, double sided glossy postcard	271,000

* Mailed in weekly batches with varying quantities.

Other Requirements

- All mailers must be mailed from within Orange County, CA
- Contractor will supply all paper and envelopes necessary for mailing
- Contractor will pay for all postage expenses
- Contractor will deliver all mailings to USPS Facility within Orange County, California
- All mailers must be connected to OCPA BCG Account (For informed delivery campaigns)
- Addresses and artwork will be sent to Consultant seven (7) calendar days prior to mailing date

General Noticing and Mailers

During and outside of designated enrollment periods, there are several customer activities which trigger the need for additional mailers to be sent, for example: opting out of OCPA services, move-in/out notifications, and more. Additionally, OCPA could elect to send additional mailers throughout the year announcing important news such as rate changes, billing updates, promotion of service offerings, or customer programs, and additional yet to be determined offering announcements.

C. PROPOSAL SUBMISSION REQUIREMENTS

Only digital submissions will be accepted. Please submit all proposals in PDF format to SHalligan@ocpower.org. Other digital formats will not be accepted.

1. PROPOSAL FORMAT

At a minimum, include the following sections:

- Company information, background, and experience
- Outline of unit price and total for each required mailer
- Estimated postage for each Enrollment Notification Mailer item
- Proof of USPS Bulk Mail Permit for mailing services within Buena Park, Fullerton, Huntington Beach, and Irvine
- Full scope of requested services
- Pertinent conflicts of interest
- References (3) and Sample Work (3-5 pieces)

2. EVALUATION CRITERIA

Bids will be evaluated on the following criteria:

- Cost to OCPA for the services identified in this RFP;
- Qualifications and experience of the entity relating to like projects
- Key personnel assigned to the OCPA team;
- History of successfully performing services for other public agencies, CCAs, or utilities;
- Proof of financial viability of the respondent;
- Existence of and circumstances surrounding any claims and violations against the respondent, its representatives or partners; and
- Pertinent references.

3. OCPA PROJECT TIMELINE

Release of RFP	June 6, 2022
Deadline for Question Submittal	June 8, 2022
Posting of Responses to Questions	June 9, 2022
Proposals Due	June 13, 2022
Tentative Award Contract (Board Approval)	June 29, 2022

D. TERMS AND CONDITIONS

1. GENERAL

Incurring Cost

This RFP does not commit OCPA to award or pay any cost incurred in the submission of the proposal, or in making necessary studies or designs for the preparation thereof, nor procure or contract for services or supplies. Further, OCPA will not reimburse proposer for any costs incurred in responding to this RFP.

Claims Against OCPA

Neither your organization nor any of your representatives shall have any claims whatsoever against OCPA or any of its respective officials, agents, or employees arising out of or relating to this RFP or these RFP procedures, except as set forth in the terms of a definitive agreement between OCPA and your organization.

Guarantee of Proposal

Responses to this RFP, including proposal prices, will be considered firm and irrevocable for one hundred eighty (180) days after the due date for receipt of proposals and/or one hundred eighty (180) days after receipt of a best and final offer, if one is submitted.

Basis for Proposal

Only information supplied by OCPA in writing by the Contact in connection with this RFP should be used as the basis for the preparation of Consultant's proposal.

Form of Proposals

Proposals must be submitted electronically by e-mail and must be received by OCPA prior to the deadline.

Amended Proposals

Consultants may submit amended proposals before the Deadline to Submit Proposals. Such amended proposals must be complete replacements for previously submitted proposals and must be clearly identified in a written format. The Contact will not merge, collate, or assemble proposal materials.

Withdrawal of Proposal

Consultants may withdraw their proposals at any time prior to the Deadline to Submit Proposals. The Consultant must submit a written withdrawal request signed by the Consultant's duly authorized representative addressed to and submitted to the Contact.

Late Responses

To be considered, proposals must be received electronically by email by June 13, 2022, 5:00 PM PST.

No Public Proposal Opening

There will be no public opening for this RFP.

California Public Records Act (CPRA)

All proposals become the property of OCPA, which is a public agency subject to the disclosure requirements of the California Public Records Act ("CPRA"). If Consultant proprietary information is contained in documents submitted to OCPA, and Consultant claims that such information falls within one or more CPRA exemptions, Consultant must clearly mark such information "CONFIDENTIAL AND PROPRIETARY," and identify the specific lines containing the information. In the event of a request for such information, OCPA will make best efforts to

provide notice to Consultant prior to such disclosure. If Consultant contends that any documents are exempt from the CPRA and wishes to prevent disclosure, it is required to obtain a protective order, injunctive relief, or other appropriate remedy from a court of law in Orange County, before OCPA's deadline for responding to the CPRA request. If Consultant fails to obtain such remedy within OCPA's deadline for responding to the CPRA request, the OCPA may disclose the requested information.

Consultant further agrees that it shall defend, indemnify, and hold OCPA or its agents, harmless against any claim, action, or litigation (including, but not limited to, all judgments, costs, fees, and attorney's fees) that may result from OCPA's assertion of an exemption or privilege as a basis for withholding any information marked confidential by the Consultant.

Confidentiality

All data and information obtained from or on behalf of OCPA by the Consultant and its agents in this RFP process, including reports, recommendations, specifications, and data, shall be treated by the Consultant and its agents as confidential. The Consultant and its agents shall not disclose or communicate this information to a third party or use it in advertising, publicity, propaganda, or in another job or jobs, unless written consent is obtained from OCPA. Generally, each proposal and all documentation, including financial information, submitted by a Consultant to OCPA is confidential until a contract is awarded, when such documents become public record under State and local law, unless exempted under CPRA.

Electronic Mail Address

Most of the communication regarding this procurement will be conducted by electronic mail (e-mail). Potential Consultants agree to provide the contact with a valid e-mail address to receive this communication.

OCPA Rights

OCPA and its Contact reserve the right to do any of the following at any time:

- a. Reject any or all proposal(s), without indicating any reason for such rejection;
- b. Waive or correct any minor or inadvertent defect, irregularity, or technical error in a proposal or the RFP process, or as part of any subsequent contract negotiation;
- c. Request that Consultants supplement or modify all or certain aspects of their proposals or other documents or materials submitted;
- d. Terminate the RFP, and at its option, issue a new RFP;
- e. Procure any equipment or services specified in this RFP by other means;
- f. Modify the selection process, the specifications or requirements for materials or services, or the contents or format of the proposals;
- g. Extend a deadline specified in this RFP, including deadlines for accepting proposals;
- h. Negotiate with any or none of the Consultants;
- i. Modify in the final agreement any terms and/or conditions described in this RFP;
- j. Terminate failed negotiations with any Consultant without liability, and negotiate with other Consultant(s);
- k. Disqualify any Consultant on the basis of a real or apparent conflict of interest, or evidence of collusion that is disclosed by the proposal or other data available to OCPA;
- l. Eliminate, reject, or disqualify a proposal of any Consultant who is not a responsible Consultant or fails to submit a responsive offer as determined solely by OCPA or its representative; and/or
- m. Accept all or a portion of a Consultant's proposal.

2. OCPA CONTACT

The evaluation phase of the competitive process shall begin upon receipt of bids until a contract has been awarded or until OCPA takes any of the actions listed under OCPA rights. Bidders shall not lobby evaluators or any member of the staff or Board of Directors during the evaluation process. Attempts by Bidder to lobby evaluators, staff or Board members may result in disqualification of bidder.

All questions regarding these specifications, terms and conditions are to be submitted in writing, via e-mail, no later than by 5:00 p.m. June 8, 2022, to:

Steven Halligan, Management Analyst

SHalligan@ocpower.org

The OCPA website will be the official notification posting place of all Requests for Interest, Proposals, Quotes and Addenda. Go to <http://www.OCPower.org> to view current contracting opportunities.