



**Westchester Power
Community Choice Aggregation
Request For Information:
City of Yonkers**

June 21, 2021

PURPOSE

Sustainable Westchester (SW) serves as the administrator for Westchester Power (WP), the first Community Choice Aggregation (CCA) program in New York State. SW is a 501(c)(3) non-profit whose membership consists of 45 municipalities in Westchester County and the County itself, representing more than 330,000 households and small businesses.

The Westchester Power program was launched in April of 2016 with 20 SW municipal participating members. The program initially included 16 communities in Consolidated Edison (Con Edison) service territory and 4 in the New York State Gas & Electric (NYSEG) territory . Currently, there are 28 participating municipalities, which will increase to 29 participating municipalities with the addition of the City of Yonkers. The aggregate usage in the City of Yonkers over the one-year period from June 2020 to May 2021 is approximately 304 million kWh. 100% of the total Yonkers load will be 100% renewable via NYS RECs.

The purpose of this RFI is to identify the suppliers (ESCOs) that are willing and able to submit a bid and can reliably serve the SW Yonkers aggregation under the guidelines set by the New York State Public Service Commission (PSC) and SW. SW will issue an RFP at the beginning of August 2021 for a contract for the WP Yonkers aggregation, which will start November 1, 2021.

The forthcoming RFP will solicit for two product types: a standard grid supply that meets the NYS minimum renewable requirements for load serving entities, and a NY State qualified 100% renewable product. The WP program is based on fixed rates, and as such, we will be requesting fixed rates that will include energy, transmission, capacity, transmission and distribution losses, RPS charges, imbalances, load factor

adjustments, congestion charges, ancillary services, and applicable taxes. No pass-through will be allowed.

RFI RESPONSE

Responses will be accepted through August 6, 2021 and should be emailed to:

Dan Welsh, Program Director	dan@sustainablewestchester.org
Nina Orville, Executive Director	nina@sustainablewestchester.org

The contracting process will follow the following schedule.

2021 Westchester Power Yonkers Contract Schedule

- RFI: July 28 - August 6
- RFP to Auction/Award: August 7 - August 18
- Contracts signed & post-contract meetings: August 19 - Sept 6
- Mailing Prep: August 26 - Sept 6
- Notification Letters Mailed: Sept 6
- Opt Out Period: September 10 - October 10
- Acct ID's requested, Enrollment Data Submitted: October 11 - October 31
- Rolling Enrollments Beginning November 1, 2021

The Westchester Power Electric Supply Agreement format is posted at:

<https://sustainablewestchester.org/wp/bids-2021-yonkers-rfp/>

Questions are welcome and answers deemed to be applicable to the RFI as a whole will be posted at the above link as well. The contract template closely follows our current contract, updated for context. It has been accepted by our municipal participants, and we therefore do not have the flexibility to make material changes. Respondents are nevertheless welcome to submit comments.

BASIC COMPANY INFORMATION	
Company Name:	
Principal Address:	
Submittal Contact Person:	
Contact Phone:	
Contact Fax:	
Contact Email:	
Contact Address:	
Company Website:	
Business Type (C-Corp, S-Corp, Partnership, etc.):	
Describe your company's organization structure including parent, affiliate and subsidiary companies (if any):	
New York Office Address (if any):	

QUESTIONNAIRE

(Supplementary attachments for the questions below are encouraged).

Authority To Supply

1. Is your company registered to serve both residential and commercial customers in Con Edison service territory?

Yes___ No___

2. Has your company completed the EDI Testing process provided by Con Edison?

Yes___ No___

Fixed price format

3. Is your company willing and able to offer a full-requirements fixed price?

Yes___ No___

4. All pricing will include energy, transmission, capacity, transmission and distribution losses, RPS charges, imbalances, load factor adjustments, congestion charges, ancillary services, and applicable taxes.

Concur? Yes___ No___

Power and Renewable Energy

5. Please indicate any and all physical electric generation assets that are owned and or controlled by your company. Indicate whether ownership and/or control are within your organization or a parent organization. If you do not intend to use your own generation, explain how your power will be sourced and your qualifications for trading electric contracts.

In March of 2018, the NY Public Service Commission clarified that renewable energy products offered by CCAs must comply with the environmental attribute and delivery rules of the PSC's Environmental Disclosure Program.

6. Please indicate your capability to serve a large number of "green" customers, including your procedure for buying and registering RECs so that individual communities which select the renewable energy default are credited for this in NY Environmental Disclosure Program reporting.

7. Please indicate if your company sees benefit in and would like to offer to buy directly or wheel in all necessary renewable power without using RECs?

Experience

8. Indicate how many years you have been in the electric supply business. List all states in which you are currently licensed to supply electric generation (if applicable). What year did your company begin selling electricity to retail customers in the U.S.? In NY State?

9. List any CCA Programs that you have served or are currently serving.

10. Please include information on the number of residential accounts currently served through CCA programs. Please list the estimated number of accounts served, broken

down by state and by year. Preference may be given to ESCOs with significant previous CCA experience.

11. Please provide CCA references. Include the name, address, contact person and phone number of each community. Briefly describe the product or service provided to each community.

Financial ability to undertake

The financial strength and stability of the potential supplier are key evaluation criteria. Please provide sufficient evidence to support this review, such as:

12. Is your company a publicly traded firm?

Yes___ No___

13. If not, please provide three consecutive years of audited financial statements. (These will be treated with confidentiality and not released to any third party).

14. Has your company or its affiliates ever defaulted or threatened to default on a contract in the municipal aggregation space?

15. If an affiliate, do you have a Parental Guarantee from the parent company that is sufficient to cover the exposure of your portfolio with this buying group added?

Yes___ No___

16. Is your company's Debt considered investment grade by a major credit agency?

17. What is the rating of your company's or parent company's long-term unsecured debt?

___ Moody's___ Standard & Poor's ___

18. Has your company filed for bankruptcy in the past three years?

Yes___ No___

Data and mailing costs

19. Under the "Order Establishing Community Choice Aggregation Data Access Fees" issued December 14, 2017 utilities may charge \$0.16 per customer for aggregated data

and \$0.84 for detailed eligible customer data they supply to CCAs. The selected ESCO will be responsible for these utility costs.

Concur? Yes___ No___

20. The selected ESCO will be responsible for all costs associated with the duplication and mailing of the opt-out notices. The selected ESCO may also be responsible for administering the opt-out process.

Concur? Yes___ No___

Customer Service Operations

WP maintains a customer service operation for first-line phone customer interaction. Many of the questions that come in concern the basic nature of the program, the participation of the municipality, opt-in and opt-out processes, green energy, etc., and we find that our familiarity with the local backdrop and program history is an advantage in those dialogues. In the event that inquiries go beyond this basic information and are more appropriately handled by the ESCO, we pass the customer on to the ESCO. The selected ESCO will be required to provide full customer service capability, including its own 800 number.

21. Describe your customer service resources and systems. In what countries are your call centers? Where is your primary call center located? What are its hours of operation?

22. Describe your process for handling billing inquiries or disputes. Please provide an average timeframe for answering requests for billing inquiries and number of inquiries handled in an average month.

23. The CCA program is different from traditional retail ESCO business in significant ways. How will you ensure that your customer service staff are knowledgeable about the program?

24. ESCO and CCA rules require that Limited English Proficient (LEP) customers be provided program information and are generally served in their native languages. Please describe your capabilities and processes for non-English translation and interpretation.

CCA Enrollment

25. The PSC Order governing CCAs sets out the requirements for the opt-out process. The selected ESCO will execute the opt-out mailings in coordination with SW. The opt-out package shall include an environmental disclosure statement, a frequently asked questions sheet, and terms and conditions along with the opt-out letter itself. The initial notification mailing shall be mailed so as to allow for transition by customers to the new contract on the first meter read after October 1, 2021, and after: a) the contract between the selected ESCO and the Municipality has been signed, and b) the ESCO has been provided the customer mailing list.

Concur? Yes___ No___

26. The utility is preparing "New Customer" files for residents who move into the member community during the term of the supply agreement on a quarterly basis. The selected ESCO shall process these files to filter out customers that had previously opted out of the program and any other ineligible accounts, and execute the opt-out mailing and enrollment process for these.

Concur? Yes___ No___

27. At the end of the term of this agreement, if the agreement has not been renewed, the ESCO will return all participating customers to the utility.

Concur? Yes___ No___

28. Customers will have the right to opt out at any time with no exit fee.

Concur? Yes___ No___

29. Customers will have the right to switch between the two supply options at any time with no fee.

Concur? Yes___ No___

Taxes and compliance with applicable laws

30. Your company will be responsible for ensuring that all federal, state and local laws are followed.

Concur? Yes___ No___

31. Your company will be responsible for fulfilling all requirements necessary to conduct business in the individual member communities' service territory.

Concur? Yes___ No___

32. Your company will be responsible for collecting and remitting all applicable taxes, including local gross receipts tax.

Concur? Yes___ No___

Additional energy and cost saving measures

33. CCAs offer a unique opportunity to introduce customers to energy saving and other related value-added products. Please describe any such products and services that you currently market to your CCA or retail customers and which, if any, of those products and services you feel might be of benefit to our customers and would like to offer.

Data Systems, Provision of Data

34. Please confirm your Electronic Data Interchange computer network is fully functional at all times and includes backup file saving systems, and is capable of handling Yonkers' residential and small commercial retail electric customers for this aggregation.

Confirm? Yes___ No___

35. In order for program administrators and participants to have visibility into their participation with the program, your company will provide data by secure means, in a regular format, to our data service company. The data transmissions include:

Pre-enrollment (mailing) files: As provided by the utility for opt-out mailings includes at contract initiation and for newly eligible customer mailings.

Post-enrollment files: Provided after the opt-out periods end and customers are enrolled with the utility. Contains additional details about enrolled and dropped customers including basic contact & billing information, utility account number, meter number, read cycle product (contract type), enrollment status and other account information

Commission files:, the rate, start date, and expiry date of the contract, billing period, charges billed, kWh billed for, and any additional fees put to the Customer.

Concur? Yes___

No___

