



CenterPoint Energy Service Company, LLC
1111 Louisiana St
Houston, TX 77002

**Online Marketplace and Instant Rebates
and/or Retail Point-of Purchase Program**

REQUEST FOR PROPOSAL (RFP)

August 2023

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Instructions for Participating in the RFP

Respondent(s) should complete this RFP in its entirety and refer any questions to Sukie Yang via e-mail in accordance with the instructions contained herein.

Contact: Sukie Yang
Company: CenterPoint Energy Service Company, LLC
Email: qian.yang@centerpointenergy.com
Phone: (713) 207 - 7185

This Request for Proposal is not an offer to enter into an agreement with any party, but rather a request to receive proposals from respondents interested in providing the services specified herein. CenterPoint Energy Service Company, LLC (the "Company") reserves the right to reject any proposal, in whole or in part, and/or to enter into agreements to provide services with any respondent. This request will be issued to a limited selection of vendors.

The Company reserves the right to choose any respondent and/or award to one or more respondents based on the Company's interest. All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content, shall be borne by the Respondent. The Company assumes no responsibility for such costs. By submitting an RFP, the submitting firm agrees to these stipulations.

Any RFP recipients who do not wish to respond are asked to provide a response to that effect to the recipient as soon as possible. All RFP responses are limited to **thirty (30) pages**, not including appendices.

An electronic version of your final RFP response must be submitted no later than **3:00 pm, CST Wednesday, October 11th, 2023**. The Company reserves the right to reject proposals received after the due date. Electronic proposals include those prepared in Microsoft Word or Adobe PDF. Hard-copy submissions will be accepted but are not necessary to be provided.

Any inquiries relating to this RFP must be submitted in Coupa by utilizing the Q&A template by 4:00 pm CST Friday, September 7th, 2023. These questions will be anonymized and answered in the order that they are received. If a respondent would like to maintain confidentiality for their questions, please notate in your submission; these questions will receive written answers no later than 4:00pm CST on

September 11th, 2023. After this scheduled timeframe, no questions may be asked pertaining to this RFP. Soliciting information from the Company employees or business partners, whether associated with this RFP directly or not, may result in disqualification.

Contacts information to submit Questions related to this RFP:


Sukie Yang: Qian.Yang@centerpointenergy.com


Timeline

• RFP Invitation	August 31, 2023
• RFP Question Submission	September 7, 2023
• Response to RFP Questions	September 11, 2023,
• Submission of RFP	October 2, 2023
• Demonstration of Proposal	Week of October 9 th
• Contract Award	October
• Contract Start Date	January 2024

Proposal Background & Objective

Headquartered in Houston, Texas CenterPoint Energy, Inc. (CNP) is an energy delivery company with electric transmission and distribution, power generation and natural gas distribution operations that serve more than 7 million metered customers in Indiana, Louisiana, Minnesota, Mississippi, Ohio and Texas. With approximately 8,900 employees, CenterPoint Energy and its predecessor companies have been in business for more than 150 years.

 CenterPoint **Indiana** provides funding for the implementation of energy efficiency (EE) projects and measures in accordance with the IRP and Gas Energy Efficiency plans. Energy efficiency measures and projects adhere to the specifications defined in the current Illinois Technical Reference Manual (TRM) Version 11.0.

 CenterPoint **Ohio** provides funding for the implementation of energy efficiency (EE) projects and measures in accordance with the PUCO approved Energy Efficiency plans. Energy efficiency measures and projects adhere to the specifications defined in the current Ohio 2020 Technical Reference Manual (TRM).

CenterPoint Energy **Minnesota** DIY (“Do It Yourself”) Home Efficiency program will provide customers opportunities for low-cost, self-install measures. Standard measures will be available at no cost to customers while certain upgrades will be offered for a fee. Customer participation is primarily initiated through an online store where customers can choose from available measures for delivery.³² This

program continues the one approved in the previous 2021-2023 CIP Triennial Plan. 33 DIY Home Efficiency has been one of the Company's most cost-effective programs in the residential segment. Changes for the Plan include the addition of two new measures.



Measures

- Thermostatic restrictor shower valve ("TRV"): Thermostatic restrictor valves work by reducing showerhead flow until the user is ready to enter the shower. Once the user enters the shower, he/she pulls a short cord on the TRV which allows full flow. In this way, the TRV reduces wasted hot water.
- Dryer balls: Dryer balls (two) provide a low-cost, energy efficient option to residential customers that can reduce drying time by up to 25%.

MISSISSIPPI AND LOUISIANA LOW-FLOW SHOWERHEAD AND FAUCET AERATOR PROGRAM DESCRIPTION

The Low Flow Showerhead and Faucet Aerator Program will provide free energy-saving low-flow showerheads and faucet aerators to CenterPoint Energy consumers. The showerheads (rated at 1.5 gallons per minute or "GPM") and aerators (rated at 1.0 GPM) will be available to residential customers. Customers will be given the option to request multiples of each low-flow unit type, within prescribed limits, to enable each household shower or faucet to perform up to the same energy-saving potential.

CenterPoint Energy will primarily promote the program through bill inserts, emails, and other channels, steering customers to a fulfillment website. For those customers without internet access, an 800 number will be provided, and a call center representative will input the customer's information. The customer will then be mailed the requested number of low-flow units, along with comprehensive installation directions. Secondary benefits include water conservation and lower impact on critical water distribution infrastructure.

MISSISSIPPI AFFORDABLE HOUSING WEATHERIZATION KIT PROGRAM DESCRIPTION

The Weatherization Kit Program is designed to provide free do-it-yourself energy efficiency measures to qualifying residential customers. The target customers are qualifying affordable housing customers where energy efficiency measures are often limited. The kit includes low flow devices and weatherization measures to help customers to conserve water, reduce energy usage, and lower energy bills.

Upon request, the Weatherization Kit, along with comprehensive installation directions, will be mailed to customers. CenterPoint Energy will promote the benefits of the program to customers, which include natural gas energy savings along with water conservation and a lower impact on critical water distribution infrastructure.

Project Purpose

The Company is seeking an experienced partner to implement an Online Marketplace and Instant Rebates and/or Retail Point-of-Purchase program, for CenterPoint Energy Efficiency Department. This program is targeted at residential customers and encourages customers to purchase products online where an instant rebate is applied. With the Instant Rebate program customers have the flexibility to receive targeted coupons either in store or via email that can be used at retail point-of-purchase either through coupon rebate or automatic discounted retail items.

Scope of Work

CenterPoint Energy currently offers an online marketplace and instant in-store rebate program for residential electric and natural gas customers. The marketplace allows customers to find instant rebates and recommended products to help them save. While the instant in-store rebate program offers residential electric and natural gas customers the ability to find instant rebates while they are shopping for energy efficiency products.

CenterPoint Energy previously provided lighting programs that discounted bulbs through the retailer with no action required from the customer.

An effective vendor should have detailed knowledge of the TRM and the Evaluation, Measurement, and Verification requirements for each region.

CenterPoint Energy envisions a program that facilitates a smooth experience for the customers who are purchasing products as well as an easy-to-understand program design. Additionally, a successful implementation partner should assist in executing on CenterPoint Energy's Energy Efficiency savings goal and provides education for customers and CenterPoint Energy staff including call center.

CenterPoint Energy encourages vendor suggestions for new or existing cost-effective solutions for this market segment, including the potential for combining multiple programs that are out for RFP.

SAVINGS (Dth)

	2024	2025	2026
Indiana	Open for vendor to propose		
Ohio	Open for vendor to propose		
Minnesota	44,483	44,638	44,792
Mississippi	10,100*	10,100*	10,100*
Louisiana	5,357*	5,357*	5,357*

* Program savings goals subject to adjustment per approval from commissions.

PARTICIPATION

	2024	2025	2026
Indiana	Open for vendor to propose		
Ohio	Open for vendor to propose		
Minnesota	15,300	16,100	16,900
Mississippi	1,739*	1,739*	1,739*
Louisiana	1,800*	1,800*	1,800*

* Program participation goals subject to adjustment per approval from commissions.

Table 1: Key Objectives & Requirements

Program implementation	<p>Provide a holistic plan per region for implementing an Online Marketplace and Instant Rebates and/or Retail Point-of Purchase program. Provide a plan utilizing the program to deliver customer trust and positive brand recognition of CenterPoint Energy among the community. This includes, but is not limited to:</p> <ul style="list-style-type: none"> • Vision for scope of the program for each year, including how this program may be able to complement the other programs in the portfolio. • The list of each measure that is proposed to include in this program and the plan to successfully implement each of these measures. <p>Provide expected incentive amount and savings per measure per year. Utilize the EIA short term energy outlook forecast for gas program cost effectiveness per year.</p>
Marketing	<p>Provide expected marketing outreach and program promotion strategies to include the following:</p> <ul style="list-style-type: none"> • Marketing and communication planning and support • Overall strategy • Market segments and targets • Outreach strategy • Promotion and rebate plan • Cross promotion • Technology or media • Budget • Metrics • Incorporate on pre-approved CenterPoint Energy branding requirements throughout the site. • Design, development, and submitting all marketing and collateral materials to CNP for approval prior to distribution, circulation, or publication. • Adherence to brand standards • Provide Marketing data points like ROI and/or cost per acquisition.
Customer Experience	<p>Provide a plan to deliver a positive customer experience. This includes, but is not limited to:</p> <ul style="list-style-type: none"> • Clear and simple customer journey • Easy-to-use navigational structure to facilitate the customers' ability to locate and select products. • Educational focus for customers to learn about the products they may wish to purchase including clear description and specifications. • Education resources for installation which might include written and video in multiple languages. • Define a method to pre-populate account validation (based on name on account, address)

	<ul style="list-style-type: none"> • Seamless customer authentication and validation utilizing account numbers, coupled with the address. • Customer support for inbound and outbound calls, emails, live chats during defined hours with sufficient staffing • Define customer complaint and resolution service level and method for training and reporting
Order Fulfillment	<p>Provide a plan that details the order fulfillment process and inventory management. This should include, but is not limited to:</p> <ul style="list-style-type: none"> • Mobile friendly (tablets and smart phones) • Defined terms and conditions customers must agree to comply with in conjunction with purchase. • Ability for customers to place orders using major credit cards, PayPal, check, other. • Shipping schedule and rate • Order confirmation and tracking • Order fulfillment service level agreements • Inventory management defined by forecasts and in advance of promotional campaigns. • Ability to establish maximum levels for customer purchases and ensure process and communication when a customer hits the max • Product return process and reporting
Technology & Reporting	<p>Provide a plan to support program reporting process and invoicing.</p> <ul style="list-style-type: none"> • SFTP directory for files to be securely exchanged. • Real time reporting to for access to customer related data. • Analytics for marketplace activity • Provide all data required for Evaluation, measurement, and verification (EM&V) • Provide ad-hoc or as needed reporting for regulatory filings, etc. • Monthly reporting related to Measures, Savings, Expenses • Monthly expense accruals required by the last business day of the month. • Training and support for reporting tool • Accurate and on time invoicing with supporting document provided at defined timeframe. • Explain how CenterPoint will be able to access your report, combine data from multiple services (or sources), and manipulate date. • Describe how the integration process to pull and push data between CenterPoint systems and your system would work. • Discuss reporting tools, dashboards and metrics that will be used to monitor and report performance, as well as take action to improve performance and costs. • Describe the monthly and quarterly reporting pattern, the ownership, and the contents. <p>Provide examples of clients where your proposed technology platform/configuration have been successfully implemented.</p>

Program Management	<p>Provide a plan and method for the overall program management support. This should include, but is not limited to:</p> <ul style="list-style-type: none"> • Meeting cadence to discuss program status, inventory levels, customer issues, delivery forecasts, marketing promotions, account status, and any other topic as needed. • Scope and change management process and communication related to any program changes i.e., website changes, invoicing change, promotional change, program administration change, inventory/shipping changes, tracking changes, etc. • Defined approval process to modify product category/measure (i.e., submit engineering calculation used to derive savings, assumptions including cost, expected useful life, net-to-gross ratios and incentive levels, sources of any value used, and any other information requested by CNP) <p>Provide a plan for expected training and technical support for:</p> <ul style="list-style-type: none"> • CenterPoint Energy Efficiency, call center, and marketing. • Providing training for participating retailers, as necessary <p>Provide a list of proposed personnel needed to implement this program along with their experience, including those local to each respective CenterPoint territory.</p> <p>Provide a list of retailers that the respondent currently works with/has a relationship with, per region</p>
Regulatory Compliance	<p>Provide a plan to verify and document savings in compliance with each region's Technical Reference Manual. Indiana uses the Illinois TRM. Ohio uses the Ohio TRM. Louisiana and Mississippi use the Arkansas TRM. Minnesota references the Minnesota TRM or filing. note that for the Indiana region we are adopting the Illinois TRM. Provide anticipated new measure categories and process to have them approved by EM&V team.</p> <p>Provide a plan to support the company's demand response (DR) program associated with the smart thermostats. This includes marketing that leverages device manufactures to target and pre-enroll potential customers into DR Programs (Opt-in).</p>

Instant Rebates and/or Retail Point-of- Purchase Program

Program Management	<p>Provide a plan to deliver an in store instant rebate and/or retail point-of-purchase (POP) program. This should include, but is not limited to:</p> <ul style="list-style-type: none"> • Provide an overview of POP process. • Identification of product categories for which a utility-sponsored incentive is available to be offered by participating retailers. • Provide a secure exchange of data via SFTP portal to pass data files. • Website where customers can select the measure they are interested in, verify their eligibility, select a participating retailer, and receive a discount barcode compatible with the retailers Point of Sale (POS) system that will apply the rebate on a given eligible measure. • Development of marketing materials and/or Point of Purchase (POP) materials.
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	<ul style="list-style-type: none"> • Training for participating retailers
	<p>Provide a plan to engage with participating retailers who offer in store instant rebate and/or retail point-of-purchase program. This should include, but is not limited to:</p> <ul style="list-style-type: none"> • Providing participating retailers, a list of specific models that would qualify, incentive to be applied, expiration date of the offer, number of unique barcode values expected to be distributed, and geographic region where customers are likely to shop. • Retailers shall return a file containing barcode data to validated customers. • Retailers shall load the applicable coupon code information into the POS system used by the retail store, allowing the discount to be deployed. • Coupon barcode must be able to be scanned by respective POS system to apply the discount. • Vendor to provide process for identifying free-ridership and spillage

Supplier Diversity Guidelines

CenterPoint Energy recognizes the importance of Minority and Women-owned Business Enterprises (MWBE) to the economies of the nation, the state, and the communities it serves, as well as the corporation itself. Therefore, we are committed to pursuing business relationships with such enterprises and using innovative approaches designed to continually improve business opportunities. Our commitment is not philanthropic—the relationships we are seeking must meet the test of providing value both to the Company and to the minority and women-owned business enterprises. Each Respondent shall provide their M/WBE status and shall provide information regarding any M/WBE participation. A copy of the **Supplier Diversity Policy Statement** is attached below. For further information, visit the website www.CenterPointEnergy.com.

Attachment A



Pricing Excel File



Supplier Diversity
Policy Statement and