

Ava Bike Electric Solicitation

Questions and Answers

Tuesday, April 2, 2024

Amendments made on Thursday, April 4, 2024 are in **red font**

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Submission Requirements & Budget

- **Under attachment A, organizational description and qualifications, do copies of audited statements for the previous 3 years count against the 5-page limit? The financials will exceed that page limit.**
 - No
- **In the Technical Evaluation Criteria table on page 18, Ava lists “Administrative Costs Are Reasonable” as one of the evaluation considerations. Does Ava have a budget range allocated or drafted for the awarded consultant’s administrative costs that we should be mindful of? Can you share an expected “reasonable“ budget for administrative costs?**
 - An expected “reasonable” budget for administrative costs would be a limit of 15%.
- **Does performance-based compensation include deliverable-based payments, such as for design, development and launch of the program portal?**
 - No. Respondents should distinguish between deliverables-based, performance-based, and other types of payment structures. One example of a performance-based incentive would “\$X per e-bike voucher redeemed by a CARE/FERA customer”

- **Page 22 of the RFP mentions both the Supplemental Questionnaire (which includes a 5-page approach to work) and a Scope of Work—are these two separate sections of the proposal? If yes, does the Scope of Work have any page limitations or formatting Requirements?**
 - The Supplemental Questionnaire (Attachment A) is one component of the required documents for submission, like the contract ready scope of work. Some required documents and some responses to the Attachment A have page limits and those are explicitly called out when they're required. Otherwise, there are no page limits, including for the contract ready scope of work on Page 22.
- **Does the budget for operating the e-bike rebate and e-bike lending library come from the \$10M allocated or are there additional funds for operating the programs? If not, what is the percentage that can be reasonable considering administrative and operations.**
 - Yes
- **Is there a separate plan for program monitoring and evaluation? If so, will Ava Community Energy be leading that effort?**
 - Ava Community Energy will monitor and evaluate the program or hire a third-party evaluator.
- **Is the scoring to decide on which respondents will be interviewed or which will be hired? Is there a scoring threshold required to get an interview? If so, what is it.**
 - The proposal evaluation, interviews, follow-up responses, and reference checks will be comprehensively factored into which vendor(s) are hired. There is no predetermined scoring threshold on who will get an interview.

Ava Bike Electric Work To Date

- **We understand that a critical factor for program success is utilizing the work done to date prior to the solicitation. Could we have access to the existing work products before April 4 to incorporate into our proposal?**
 - Ava will share the work done to date with the winning vendor(s) as it will require a NDA to be signed. The exception will be an adjusted customer journey, which Ava will be posted on the Solicitation as Attachment E by Friday, April 5, 2024 at 5:00 PM PST.
- **Can you share the current outline terms of the 12 bike shops that have committed to participate in the incentive program kickoff so one understands their expectations at this time?**
 - The terms of those agreements are as follows. Ava does not not expect this to be the same agreement in place between a new program implementer and participating locations.

1. Period. The period for this Program shall be from the Effective Date through December 31, 2026.
2. Program and Sponsor. This Program shall be for the Ava Bike Electric Incentive Program (“Program”) sponsored by Ava Community Energy (“Sponsor”).
3. Budget. The amount allocated to Partner for this Promotion is Not Applicable. Any financial transaction is only based on invoiced Sales Data Reports.
4. Sales Data Reports. Each Sales Data Report must include the following information:
 - a. Product model numbers and descriptions
 - b. Date of retail sale
 - c. Quantity sold
 - d. Itemized cost per SKU incentive levels for each Product
 - e. Participant Coupon codes
 - f. Total incentives
 - g. Returns (if applicable)*
5. Invoicing. Partner shall submit invoices and Sales Data Reports no later than the 15th calendar day of each month.
6. Payment. Subject to Section 5 of the Agreement, Vendor will pay Partner within forty-five (45) days of Partner’s invoice date.
7. Volume. If Partner is a retailer, Partner agrees to limit Product purchases as follows. If Partner is a manufacturer, Partner agrees to work with their retailer locations to limit Product purchases as follows. Requirement: One product per coupon.
8. Locations. Products shall be sold at the Locations listed in Attachment A.
9. Eligible Products. The eligible Products and incentives are listed in Attachment B.
10. Coupons. The quantity of coupons for each Product during the Period is listed in Attachment C.

- **Can you share the names and contacts to the 12 bike shops referenced above?**
 - Ava is in ongoing contact with the bike shops in our service area, including the 12 bike shops who previously contracted to participate in the program. We will share OEM and local bike shop contact information to the winning respondent(s).
- **Does the IEC 62133 standard fulfill the requirement for battery certification?**
 - Consumer safety is paramount for this program. We haven’t seen evidence that IEC 62133 meets the same thresholds of safety for e-bike batteries as the three certifications listed on Page 25 of Attachment B. If a respondent would like to amend our technical specifications, please lay that out in your proposal and provide justification.
- **Can Ava Community Energy share more information about its marketing plan or any examples of any marketing materials?**
 - Ava will share the marketing plan with the winning vendor(s). Ava has planned to market this program via email, direct mail, geo-targeted social media, geo-targeted outdoor (bus sides and kings, billboards, etc.), and community-based

partners. The marketing plan will be led by Ava, while being reviewed and refreshed as a partnership with the new vendor(s).

- **What didn't work out with the previous vendor? What are keys to working successfully with Ava?**
 - Ava is focused on incorporating the lessons learned and looking ahead toward a successful reboot of the program. We encourage vendors to see Ava as a partner through the process, not a traditional consulting client who is more deliverables driven. Be ambitious, yet realistic in your proposal. Clearly identify any risks to delivery and how you plan to mitigate the likelihood of those risks occurring.
- **Can you relink the approved Bicycle Brands/ Vendors that eligible to be sold for the Voucher program (The link was broken)?**
 - The link being referred to here is enclosed in Attachment B (p.25-26) of the solicitation.
- **Does Ava Community Energy and ACTC already have a protocol set up for bike shop vendors to provide safety training, security protocols (locking up the bike properly), and biking etiquette overviews to customers before they are given the e-bike (for lending or purchase)?**
 - Ava has a draft of the requirements for e-bike lending locations and draft educational material that would be included on our webpage for participants in the incentive program.
- **What exactly are the steps that you see in the customer journey? What steps happen after eligibility and prior to survey?**
 - The customer journey that's been completed to-date will be posted on the Ava Bike Electric Solicitation as Attachment E by Friday, April 5, 2024 at 5:00 PM PST.

Participant Eligibility & Verification

- **Will Ava verify the eligibility of both Ava customers (for the \$4M dedicated to Ava customers for e-bike purchases) as well as eligible Alameda County residents (for the \$4M available to any eligible Alameda County resident)? Will that eligibility verification include age for both Ava customers and Alameda County residents as well as income verification for Alameda County Residents?**
 - Ava will verify the eligibility for Ava customers and Alameda County residents. That verification will include income and require the enrollee to attest they're 18 years or older.
- **Will all potential participants come through Ava or will Alameda County residents also have the opportunity to request participation directly? And how about the**

unhoused, will Ava be able to qualify Alameda County residents living in temporary housing and would these individuals be eligible to participate?

- All potential participants will come through Ava's eligibility check, including those that are not our customers in Alameda County. For non-Ava customers, program participation does require providing proof of residence at a residential address, whether permanent or transitional, in Alameda County.
- **Will Ava qualify any participant requiring an adaptive e-bike, such as by reviewing documentary evidence from an applicant's doctor?**
 - Ava will not be pre-sorting interest collecting medical evidence for people to qualify for an adaptive e-bike.
- **How does Ava define a household since there could be multiple families living in the same unit? Would those multiple households be limited to 2 vouchers in total?**
 - A household is a single address. For the initial program rules, there is a limit of 1 e-bike incentive voucher and 1 e-bike lending session per eligible person. There is a limit of 2 e-bike incentive vouchers and 2 e-bike lending sessions per household.
- **Ava has created and tested a participant application that verifies eligibility criteria. Only eligible participants will be provided to the selected vendor(s) via data transfer. Is this an IOS/Android application or online form?**
 - This is an on-line form located on Ava's program webpage. It's been successfully tested on different browsers via desktop and smartphone.

Incentive Program Design

- **Regarding stacking of incentives, is Ava simply looking to track other incentives obtained by participants or to reduce its incentive amount if other incentives are obtained by a participant? If the latter, and total incentives are greater than the e-bike cost, would Ava's incentive be reduced, or would that fall to the other party's rebate amount? And for tracking, what details need to be gathered on the incentives not offered by Ava, but reported to Ava?**
 - Ava is interested in our implementer aligning program requirements with other relevant programs, like the State of California income qualified e-bike incentive, to support a smoother process for eligible participants and reporting on what other incentives were utilized by participants. This reporting would include the incentive name, amount used, and any additional items & cost of items that incentive covered. If incentives are stacked, Ava's e-bike incentive can be the first processed.
- **Will online retailers be required to follow the same reimbursement process as brick-and-mortar retailers?**

- If a vendor provides an option to purchase bikes online from retailers, then the participant incentive will still need to be processed at the point of sale.
- **What is more important to Ava, the full allocation of incentive funds each quarter to residents or distributing the funds to users that will change transportation behavior to expand their use of bicycles?**
 - Based on local and non-local e-bike programs, we don't anticipate that full allocation of incentive funds during each tranche will be a barrier. It's important to Ava that at least 40% of the incentive funds are redeemed by income-qualified participants and this program changes transportation behavior by reducing vehicle miles traveled and increasing miles traveled on bikes, while supplemented and supported by trips on public transit.
- **Does Ava have any estimates or established targets for the number of incentives redeemed, and distributed, for years 1 and 2? How many incentives is Ava planning to issue each month?**
 - Ava is not pre-determining targets for respondents. With that said, we are not interested in purely having incentives distributed and redeemed as fast as possible. Instead, respondents should include a recommendation & goal for monthly, quarterly, and total incentive distribution given the proposed budget, implementation period of the program, bike shop enrollment, and other factors explained by respondents.
- **Would Ava be open to providing an adder to low income e-bike participants that includes safety and security accessories (helmet, lock, lights, etc.)?**
 - Yes. If you plan to include that in your proposal, indicate that as a separate line under incentives and why this would be important especially in light of the State of CA income qualified incentive being eligible to stack with Ava's program and inclusive of e-bikes & accessories.
- **Do vouchers have an expiration date?**
 - We are open to suggestions. As of now, we projected the voucher to be valid for redemption within 60 days of being issued.
- **2.7. Scope of Work: Program Implementation Manual ("PIM") requires the vendor develop "mitigation plans for the unauthorized reselling of e-bikes." Does Ava have any parameters for this requirement; what is allowed and what is not?**
 - No, we are leaving that up to a vendor for guidance and to make recommendations.

Lending Program Design

- **For the lending program, can we ask participating retailers to wait for reimbursement until after the e-bike is returned so the retailer can enter in the requisite information needed, such as the return date, number of miles traveled, etc.**
 - Yes, and identify your net payment days to reimburse participating retailers.
- **The Lending program on page 10 is defined as one “that pays for short-term lending sessions from existing local bike shops that rent e-Bikes”. Is Ava open to alternative e-bike Lending Library models which may be more diverse and inclusive?**
 - Ava is interested in a faster go-to-market lending option in the short-term than what we’ve found would be required with standing up brick-and-mortar new lending locations managed by a respondent. Ava is open to any lending delivering model, local bikes shops or otherwise, that meets the outlined program requirements and leverages existing lending infrastructure. If that existing infrastructure is not at the scale needed for your proposal, then please identify what’s needed in your response to that section.
- **For participants, there are no incentives to trial an e-bike from the Lending Library before utilizing the purchase incentives. We understand this should not be a requirement, but would an incentive to trial before purchase be of interest?**
 - We are expecting respondents to propose what the incentive would be for a voucher-based e-bike lending program within the \$2M lending program budget. There’s no proposal or interest in a third intervention between lending and ownership. If a trial is meant to be longer than a lending session and there’s data that shows this increases the likelihood of ownership, then please include that as part of the scope in the lending program.
- **Is a lending session mandatory to participate in the voucher program?**
 - No
- **Is there a maximum % of CARE or FERA households that can participate in lending sessions? Could 100% of incentive funds be allocated towards these households?**
 - There’s no maximum % of CARE/FERA participating households. The program cannot only serve these households as the goal is to accelerate e-bike access and adoption for all of our customers and Alameda County residents.
- **Can participants extend their lending session if they would like?**
 - Our initial thinking on this would be that participants could extend their lending session if they would like but they would need to pay for it. Ongoing extensions of lending sessions limit participation of others in terms of e-bike availability and funding. For example, the program requirement would be that a lending term would last X days and the lending provider would be reimbursed a pre-negotiated amount of \$Y. Anything beyond those days would be a balance that the

participant would need to pay the provider for, while the provider only invoices our program implementer for the pre-negotiated \$Y amount.

- **Assuming lending sessions aren't mandatory, could lending session participants be prioritized for vouchers?**

- The intention of prioritizing lending session participants for a voucher is something we've considered but haven't been able to figure out how to avoid an unintended consequence: unnecessary lending sessions. Many incentive program applicants won't need a lending session first to be a determining factor in applying to the incentive program. Given the expected high demand, many incentive program applicants won't receive an incentive. If the likelihood of getting an incentive increases or is guaranteed with a lending session, then we would anticipate more of our lending sessions being filled by those who don't need that experience and thus limit the opportunity for those who do.

Ava is open to creative solutions, especially those that improve the customer experience, in this example and others so long as unintended consequences can be mitigated.

- **Has Ava prepared any qualification criteria for what constitutes an eligible "e-bike lending service" (p.11) that can be voucher funded?**

- No. We would like to see that from respondents to the lending program.

- **Has Ava prepared any qualification criteria for what "appropriate training & education" (p.11) qualifies a lending partner to be eligible?**

- No. We would like to see that from respondents to the lending program.

- **Will the vendor be expected to reimburse lending locations for damages incurred to e-bikes during lending sessions or for bikes that are never returned? Who is accountable for theft of e-bikes that are rented from the lending library?**

- The operator of the lending services is expected to be responsible for carrying the appropriate insurance for injury to participants, e-bike damage, or property theft.

- **Does Ava have any estimates or established targets for the number of bikes borrowed, and number of bikes purchased, for years 1 and 2?**

- Ava is not pre-determining targets for respondents. With that said, we are not interested in purely having incentives distributed and redeemed as fast as possible. Instead, respondents should include a recommendation & goal for monthly, quarterly, and total lending sessions completed given the proposed budget, implementation period of the program, available supply, length of lending sessions, and other factors explained by respondents. We also don't have any predetermined targets for the conversion rate of those who complete an e-bike lending session and go on to purchase an e-bike with our incentive or without.

- **Which regions are not served by any existing lending library distribution locations?**
 - Ava does not operate any existing e-bike lending distribution locations. The only known e-bike lending location that's scheduled to open up in our service area is by the City of Oakland.

Marketing

- **Will Ava be maintaining the program landing page?**
 - Yes
- **Who are the community partners that you're already working with? In what capacities do you expect to work with these partners? Are the community partners getting paid? If so, what budget will the community partners be paid out of? Will they be lending library distribution points?**
 - Ava is engaged with 25 community-based partners that include our local municipalities, community-based organizations, regional governments, and transit agencies. We will introduce the winning vendor(s) to these organizations. Community-based organizations are eligible for sponsorships from Ava. There is no separate program budget to pay partners, nor do we expect them to be distribution points for e-bike lending through the model proposed in the RFP.

Technology & Data

- **The RFP mentions Ava accessing customer data via SFTP or API—could this be done through a secure online portal instead?**
 - No, we would share data either via SFTP or API, with API being the preferable method. The process would have to be automated, which a secure online portal would not allow for.
- **Do you need an IOT solution for tracking purposes on each lending library bike?**
 - This is not a program requirement. Lending providers are responsible for e-bike tracking and reporting in a manner that they're comfortable with.
- **Ridership tracking – there is only one mention to track usage for either the incentive or lending library use. (ie: pg 13, e-bike Lending C,b,vi,E) We have that found ridership data (duration, frequency, distance traveled, etc) and GPS data (start, end, and route mapping) are typical requirements for lending libraries in order to observe how customers are incorporating an e-bike into their daily lives. Is this a strong interest of Ava?**
 - There is strong interest in obtaining this utilization data automatically instead of post-session reporting and follow-up surveys. This may be too onerous of a requirement though through a lending program that's leveraging different outlets for these sessions. It's also not reasonable to make this a requirement for

participants in our incentive program. Respondents should explain to Ava how you can reasonably obtain utilization data in the program(s) you're proposing to implement.

- **Do you require apps for Android and iOS for the lending portal or is a web-based version of the portal ok?**
 - There is no requirement for a lending portal to be on a smartphone, although all websites should be tested and functional on smartphones.

- **"Ava has created and tested a participant application that verifies eligibility criteria" (page3) but later "Vendor should have or quickly develop a portal" (page 5) - Can Ava please describe in greater detail how they anticipate the internal and external portals to interact, and what tasks each portal would perform? This might be illustrated in detail in the WIP "customer journey" referenced on Page 6. Would Ava make that document available to bidders, for the purpose of a more accurate proposal?**
 - Ava's application is tied to our Salesforce CRM. The ideal scenario is that a vendor's portal data ties to its CRM that would have a real-time API to send/receive data between our systems. The customer journey that's been completed to-date, which leverages a daily SFTP file transfer, will be posted on the Ava Bike Electric Solicitation as Attachment E by Friday, April 5, 2024 at 5:00 PM PST.

- **2.4. Vendor Technology Requirements: Incentive and Lending Program Requirements states that "The vendor should have existing CRM infrastructure that it will use to securely store Ava Bike Electric participant data." If different vendors are awarded the Incentive and Lending programs, will they be required to share CRM data and infrastructure?"**
 - No, although each vendor will be required to follow the same requirements to receive and send program & participant data to Ava on a daily basis.

- **2.4. Vendor Technology Requirements: E-bike User Management states that "Vendor should have or quickly develop a portal that will be used by eligible e-bike customers and/or retailers to provide any required participation information." If different vendors are awarded the Incentive and Lending programs, will they be expected to develop/share one portal to be used universally?**
 - No

- **Are you ok with a user interacting with a mobile app for borrowing a lending library bike?**
 - Ava is okay with any solution that provides an intuitive and responsive customer experience, while also reporting program status changes & other key data points to us on the back end.

- **For daily data exchanges, where would the client want this information to live? Is in a CRM, as reports, etc?**
 - Data has to be stored in a secure cloud-based server with the appropriate cyber and data security protections in place. It doesn't matter to us if the data is stored in a database or a CRM as long as respondents are able to move a customer across the customer journey and are able to perform daily data exchanges with Ava.

Service Level Agreements

- **Does the Customer Average Hold Time (AHT) of 5 minutes and limit of 15 minutes cover periods when random selection events are being held or during the initial sign-up period? Our experience is that these times could have thousands of participants reaching out to customer service representatives, which makes it difficult to keep hold times to these requirements.**
 - Ava understands there will be periods of time where the AHT and limits won't be a reasonable expectation given increased demand. We do expect the AHT and limits to be a rolling average over any 4-week period. Vendors could also add and include in their customer support the ability for customers to receive a return call at any point after their hold time extends beyond X minutes as a means of meeting that SLA during high demand times and providing quality customer service.
- **The RFP mentions that customer support needs to be available in Simplified Chinese—is availability of these two dialects an acceptable alternative: Shanghainese and Sichuan (Szechuan)?**
 - No, these are different in writing and pronunciation from the intent to serve our customers more broadly. Ava requires vendors to provide written customer support in Simplified Chinese and verbal customer support in Mandarin.
- **For customer support, if some participating bike shops open as early as 8am and other participating shops stay open as late as 8pm, would you want customer support available via phone and email during this entire period? Would you like customer support to be available 7 days/week?**
 - We are expecting customer support to be available during critical times for program participation, as well as standard business hours. We don't expect this would be 12 hours per day, 7 days a week. Please submit your customer support plan per Section 2.7.B.a on Page 9 in your proposal.