



## **Filing Receipt**

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SOAH DOCKET NO. 473-23-04312  
PUC DOCKET NO. 54614

APPLICATION OF EL PASO	§	BEFORE THE STATE OFFICE
ELECTRIC COMPANY FOR	§	
APPROVAL OF TEXAS ELECTRIC	§	OF
VEHICLE-READY PILOT	§	
PROGRAMS AND TARIFFS	§	ADMINISTRATIVE HEARINGS

EL PASO ELECTRIC COMPANY'S RESPONSE TO  
COMMISSION STAFF'S  
FIRST REQUEST FOR INFORMATION  
QUESTION NOS. STAFF 1-1 THROUGH STAFF 1-8

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STAFF 1-1:

Please refer to page 22 of the Direct Testimony of Angelina Rodriguez. Please provide a detailed cost breakdown for each program summarized in Table 2: Proposed Two-Year Budget for Texas EV-Ready Pilot Programs.

RESPONSE:

EV Smart Rewards Pilot Program costs of \$804,947 consists of the following two components:

- Vendor Costs (for software-as-a-service): \$533,456
- Customer Incentive Cost: \$271,491
  - Estimated number of customers: 880
  - One-time enrollment incentive per customer: \$125
  - Max annual incentive per customer: \$50
  - Max monthly incentive for low carbon or other demand event (max of 6 months per year): \$5.00
  - Applicable sales tax of 8.25%

PowerConnect Pilot Program cost of \$3,095,950 which was estimated based on the costs of providing a rebate credit to help reduce or offset utility-side infrastructure costs for non-residential customers who are installing EV charging equipment at the following locations:

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/

/

/

Location	Number of Sites	Total Estimated Cost Including Applicable Sales Tax
Workplace	15	\$324,750
Public Level 2 Charging	24	\$519,600
Fleet	7	\$757,750
Public DC Fast Charging	5	\$1,082,500
Multi-Unit Dwellings	19	\$411,350

Take-Charge TX Pilot Program cost of \$7,382,650 which was estimated based on the costs of purchasing, installing and operating charging equipment, including a fully turnkey solution at the following locations:

Location	Number of Sites	Total Estimated Cost Including Applicable Sales Tax
Workplace	10	\$595,375.00
Public Level 2	24	\$1,428,900.00
Fleet	3	\$893,062.50
Multi-Unit Dwellings	75	\$4,465,312.50

Preparer: Edwin Martinez

Title: Project Manager- Electrification

Sponsor: Angelina Rodriguez

Title: Supervisor- Electrification

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STAFF 1-2:

Please provide and explain in detail the costs for the EV-Ready pilot programs that EPE is proposing to recover in this proceeding.

RESPONSE:

Please refer to the Direct Testimony of George Novela, page 17, lines 10-18 and EPE's response to Staff 1-3.

Preparer: Edwin Martinez

Title: Project Manager- Electrification

Sponsor: Angelina Rodriguez

Title: Supervisor- Electrification

George Novela

Director- Economic and Rate  
Research

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STAFF 1-3:

Please provide and explain in detail the costs for EV-Ready pilot programs that EPE is not seeking to recover in this proceeding.

RESPONSE:

El Paso Electric is not proposing to recover the costs of the proposed EV Smart Rewards Pilot Program or PowerConnect Pilot Program in this proceeding. The costs of the projects initiated under the Take Charge TX Pilot program are proposed to be recovered directly from participating customers to avoid any financial impact to EPE's non-participating customers.

Preparer: Edwin Martinez

Title: Project Manager- Electrification

Sponsor: Angelina Rodriguez

Title: Supervisor- Electrification

George Novela

Director- Economic and Rate  
Research

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STAFF 1-4:

Please provide the estimated costs and a detailed breakdown of the estimated costs for the Whole House EV (WHEV) pilot program.

RESPONSE:

There are no estimated costs for the Whole House EV (WHEV) pilot program. The WHEV is an incentive credit on the applicable customer's monthly electric bill.

Preparer: Manuel Carrasco

Title: Manager – Rate Research

Sponsor: Manuel Carrasco

Title: Manager – Rate Research

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STAFF 1-5:

Please refer to page 15 of the Direct Testimony of Angelina Rodriguez. Please provide the following for EPE' s process to select a vendor to implement the EV Smart Rewards pilot program.

- a. The request for proposals (RFP) for software and/or services;
- b. List of vendors to whom RFP was sent; and
- c. Selected vendor;

RESPONSE:

- a. Please see Staff 1.5- Attachment 1 for a copy of EPE's issued RFP.
- b. EPE sent out its RFP to the following list of vendors and posted it on EPE's public website:
  - dcbel
  - Electriphi
  - EnergyHub
  - envelio GmbH
  - ev.energy
  - EVGateway
  - FleetCarma
  - FlexCharging
  - Geotab
  - Greenlots



- Nuvve
- Rolling Energy Resources
- Sawatch Labs
- Uplight
- WeaveGrid
- ZappyRide

c. EPE selected ev.energy as a vendor for EV Smart Rewards pilot program.

Preparer: James Pleasant

Title: Staff Engineer- Electrification

Sponsor: Angelina Rodriguez

Title: Supervisor- Electrification



**EL PASO ELECTRIC COMPANY  
Request for Proposals  
2022 Electric Vehicle Managed Charging Pilot  
Program**

**RFP# EPE-111020217-LG**

Louie Gonzalez  
Contract Negotiator  
100 N. Stanton, Loc. 121  
El Paso, TX 79901  
Phone: 915-521-4762  
E-mail: [louie.gonzalez@epelectric.com](mailto:louie.gonzalez@epelectric.com)

**Issue Date:** July 1<sup>st</sup>, 2022  
**Proposal Due Date:** August 5<sup>th</sup>, 2022  
**Estimated Contract Award Date:** September 30<sup>th</sup>, 2022

2022 EV Managed Charging Pilot Program RFP

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2022 EV Managed Charging Pilot Program RFP

## **1.0 OVERVIEW**

El Paso Electric Company ("EPE" or the "Company") is requesting proposals from qualified providers of software and /or services that will enable the implementation of Electric Vehicle ("EV") Managed Charging Pilot Program ("Program"). The Program will be a voluntary subscription program that will enable EPE to gauge the acceptance and efficacy of a managed charging that targets EV load from residential and commercial customers. The goal of this pilot program is to evaluate the effectiveness of utility's control of customer EV charging schedule to a) reduce impacts of EV charging on the electric grid during peak hours, b) mitigate a new load spike after peak hours (also known as a "timer peak"), c) evaluate the potential to absorb excess renewable energy or energy during low carbon hours; d) increase customer engagement with the utility and help customers control charging costs. The Bidder should propose a managed charging software solution that can connect to both vehicle telematics and electric vehicle supply equipment ("EVSE").

This Request for Proposal ("RFP") requires Bidders to describe their proposed Managed Charging software solution in detail, including its design and functionality, connectivity, and scheduling capabilities with vehicle telematics and EVSEs, provide an estimate of potential load savings and load shifting in kilowatts ("kW") from similar type managed charging programs currently active or completed. The Bidders shall also describe if the solution will allow the utility to randomize the start time of customer's vehicle charging, based on driver's preference for the desired departure time and initiate charging during mid-day to match the times of high solar generation or low-carbon hours. The bidder shall also provide a detailed description of customer enrollment process, customer-facing mobile app as well as utility-facing platform or dashboard. In addition, Bidders must detail the costs associated with the proposed pilot program, including hardware and software costs, project management, marketing, and any associated maintenance or service fees.

### **1.1 Purpose**

EPE seeks competitive proposals for the purchase of software and/or services for EPE's Managed Charging Pilot Program. Bidders' proposals should focus on a program that enables EPE to schedule customer's EV charging without compromising customer's comfort levels. EPE's pilot program will focus on evaluating the efficacy of the program to avoid higher cost periods of energy supply, help customers manage use and costs, increase customer engagement, and enable renewable energy integration.

2022 EV Managed Charging Pilot Program RFP

The Program will initially be open to EPE's residential and commercial customers (including fleets, multi-unit dwellings, and workplaces) in its Texas and New Mexico service territories. EPE's intends to implement the Program after receiving New Mexico Public Regulation Commission ("NMPRC") and Public Utility Commission of Texas ("PUCT") approvals. EPE seeks to enter into an agreement with one or more vendors to operate and monitor the pilot program. After selection of third-party vendor(s) and completion of contract negotiations, EPE will file an application with state regulatory agencies for a final Program approval. EPE seeks to have a Program duration of 2 years, however, the Program duration may change depending on the approval and feedback from each of the state's regulatory agencies during the final Program approval.

The proposal shall describe the Bidder's platform for management of vehicles, EVSEs or other devices. In addition, the Bidders shall describe the Program maintenance schedule, including frequency and length of maintenance, and any required down time during specific hours.

Bidders shall describe how their proposed program will engage EPE's customers in managed charging and if the Bidder's solution can provide participating customers access to web-portal, mobile applications ("apps"), or other interactive tools. In addition, the bidder shall describe available capabilities to issue customers off-bill incentives (gift cards, checks, PayPal or Venmo credits), or available billing system integrations for on-bill incentives. The proposal shall describe the degree to which the managed charging system will require EPE's participation in the operation of the program. EPE currently does not have a Distributed Energy Resource Management System ("DERMS").

The Bidder's managed charging solution should enable the creation of program reports that include load shifting results and customer data to be submitted for validation by the Company or provided on-demand through a utility-interfacing dashboard. During the term of the Program, EPE may select a sample of customers for interval metering to validate data reports provided by the selected Bidder.

In addition to defining measurable load shifting of the proposed program, the proposed solution should be scalable. The managed charging software platform design should allow for future program expansion and the management of thousands of vehicles and charging ports. The managed charging solution architecture needs to incorporate the latest cyber security techniques and standards provided by the Company.

The Company will consider the overall cost of the proposed program, the Bidder's experience with similar type programs provided to other utilities, estimated program implementation timeline, and value of the program to EPE's customers and the Company. EPE may elect to select one proposal or a combination of

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proposals from more than one Bidder to offer one or several managed charging program options to EPE's customers.

## **1.2 Communications**

All communications from Bidders to EPE, including questions regarding this RFP, must be submitted via electronic mail. Based upon the nature and frequency of the questions EPE receives, EPE will choose to respond to individual Bidders either directly, post a response to the question on EPE's website, or address the question through a conference call.

All submittals, inquiries, and communications related to this RFP should be directed solely to the following EPE point of contact:

Louie Gonzalez  
Contract Negotiator  
E-mail: [louie.gonzalez@epelectric.com](mailto:louie.gonzalez@epelectric.com)

The EPE EV Managed Charging RFP Solicitation webpage can be found at:  
<https://www.epelectric.com/company/request-for-proposals>

**All communications between Bidders and EPE shall be conducted via email. Oral communications are discouraged and shall not be binding upon EPE.**

## **1.3 Confidentiality of Responses**

EPE will consider proposals and associated information submitted by Bidders to be confidential. It is the Bidders' responsibility to clearly indicate in its proposal what information it deems to be confidential. Bidders may not mark an entire proposal as confidential, but instead must mark specific information on individual pages to be confidential in order to receive confidential treatment. Except as required by regulatory reviews, EPE will use reasonable efforts to avoid disclosure of information designated as confidential to persons other than those involved with the evaluation, selection and any subsequent negotiations. To the extent that Bidders receive information from EPE, Bidders shall maintain the confidentiality of such information and such information shall not be available to any entity before, during or after this RFP process unless required by law or regulatory order.

Bidders shall be aware that information received in response to this RFP will be subject to the review of applicable local, state and/or federal regulatory agencies, specifically including, but not limited to NMPRC and PUCT. All Bidders shall cooperate with EPE in making technological descriptions, pricing and other

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contract terms available for review as part of any regulatory approval process as EPE deems necessary or appropriate. EPE will follow applicable orders and rules of the NMPRC, PUCT and/or other applicable agency, including any protective orders issued, such as disclosure of price, terms or other information as required; therefore, EPE cannot promise that information marked as confidential will not be publicly disclosed, and, as such, EPE cannot be held liable for any information that is ordered to be released or that is inadvertently released.

Moreover, information submitted in response to this RFP may become subject to federal or state laws pertaining to public access to information as a result of any reviews conducted by the aforementioned agencies. EPE shall not be liable for the release of any information subject to disclosure under any laws pertaining to public access to information.

## 2.0 EL PASO ELECTRIC COMPANY SYSTEM DESCRIPTION

### 2.1 Company Overview

EPE is a public utility engaged in the generation, transmission and distribution of electricity in an area of approximately 10,000 square miles in the Rio Grande Valley in West Texas and south-central New Mexico as illustrated in Figure 1. As of December 2021, EPE serves approximately 450,000 residential, commercial, industrial and wholesale customers. EPE distributes electricity to retail customers, principally in El Paso, Texas and Las Cruces, New Mexico, utilizing remote and local generating stations.

For a complete history of the Company and its services, please visit its web site at: <https://www.epelectric.com/about-el-paso-electric/history>

As of December 2021, EPE estimates there are over 2,200 plug-in electric vehicles registered in its service territory. Table 1 below presents EPE's forecasted EV saturation in its service territory over the next 10-years:

*Table 1: Forecasted Light-duty EVs in EPE's Service Territory*

Year	Cumulative Estimated Number of Vehicles		
	TX	NM	Total
2022	2,610	744	3,354
2023	3,943	1,061	5,004
2024	5,930	1,505	7,435
2025	8,854	2,125	10,979
2026	13,084	2,976	16,060
2027	19,051	4,125	23,176
2028	27,176	5,639	32,815
2029	37,725	7,570	45,295



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<b>2030</b>	50,603	9,936	60,539
<b>2031</b>	65,192	12,693	77,885
<b>2032</b>	80,388	15,728	96,116

EPE's initial intent of the Program is to target a min of 100 customers but no more than 10% of EV customers to enroll in the pilot program, with an estimated program launch timeframe in 2023, after receiving regulatory approvals from PUCT and NMPRC. Please see Section 3.1. Pricing for more information.

EPE is in the process of seeking regulatory approval in both its New Mexico and Texas service territories for an Advanced Metering System ("AMS"). Proposals that include AMS-based communications as an option for future integration may be submitted.

## 2.2 El Paso Electric Property



Figure 1 - EPE Service Territory and Electric System

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### 3.0 BIDDER TERMS

#### 3.1 Pricing

- a. Proposals shall include costs for all components of the proposed Program and indicate any discounts relative to the Bidder's cost or list price. If Bidder's pricing is dependent on the number of participants in the program, Bidders must provide pricing options based on different levels of customer participation, as specified below.

Please include the upfront set up costs, and specify if ongoing costs are fixed or variable, and if those variable fees are based on the number of vehicles or devices enrolled in the program and have all cost separated by year 1 and 2 of the program duration and separated by state. If ongoing costs are variable due to the program size, please specify the price per **residential** participant, as indicated in the tiered basis below:

- 100 participants (80 in Texas and 20 in NM)
- 500 participants (400 in TX and 100 in NM)
- 1,000 participants (880 in TX and 220 in NM)

EPE may decide to implement a smaller or larger program, depending on the variable pricing of the received bids.

For **commercial customers** that may include school districts, businesses, fleets, apartments and multi-unit dwellings, EPE anticipates a small pilot program size of approximately 10-20 entities. EPE anticipates launching the program within a few months of receiving a regulatory approval from PUCT and/or NMPRC, with the anticipated start timeframe in 2023. EPE may choose to start the program only in Texas or New Mexico, or both.

EPE may choose to collaborate with the selected bidder on program marketing. Bidder shall include pricing for marketing of the pilot program, as an optional item while describing a list of marketing activities.

Pricing should be valid until December 2022, or until contract negotiations are complete.

#### 3.2 Collusion

By submitting a proposal to EPE in response to this RFP, the Bidder certifies that the Bidder has not divulged, discussed or compared its Proposal with any other Bidder(s) and has not colluded whatsoever with any other Bidder or third parties with respect to this or other Proposals.

2022 EV Managed Charging Pilot Program RFP

#### 4.0 RFP SCHEDULE

The following schedule and deadlines apply to this solicitation:

RFP Issuance Date	July 1 <sup>st</sup> , 2022
Bidder's Conference Call	July 8 <sup>th</sup> , 2022
Notice of Intent to Bid/ Submission of Bidder Questions	July 15 <sup>th</sup> , 2022
Response to Bidder Questions	July 22 <sup>nd</sup> , 2022
<b>Proposal Due Date</b>	<b>August 5<sup>th</sup>, 2022</b>
EPE Initial Screening and Bidders Short List	August 19 <sup>th</sup> , 2022
Short Listed Bidder Presentations	Aug 25 <sup>th</sup> - Sep 1 <sup>st</sup> , 2022
EPE Selection of Bidder - Tentative Date	September 8 <sup>th</sup> , 2022
Contract Negotiations and execution of agreements Tentative Date	September 30 <sup>th</sup> , 2022
Pilot Project Implementation Date (after PUCT and NMPRC approval)	TBD

EPE reserves the right to modify, cancel or withdraw this RFP and to revise the schedule specified above if, in the sole discretion of EPE, such changes are necessary. To the extent reasonably possible, EPE will inform Bidders that have filed a Notice of Intent to Bid of any schedule change.

#### 4.1 RFP Issuance

EPE will extend an electronic invitation to companies and entities that EPE identified while conducting market research on available managed charging programs/solutions. In addition, EPE will post the RFP on its website at <https://www.epelectric.com/company/request-for-proposals> to allow other entities to participate in the RFP process.

**Receipt of the RFP invitation *must be confirmed*** via e-mail response from Bidders with EPE's point of contact, Louie Gonzalez, at the following e-mail address:

[louie.gonzalez@epelectric.com](mailto:louie.gonzalez@epelectric.com)

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#### **4.2 Notice of Intent to Bid**

Bidders must submit a Notice of Intent to Bid, included as Attachment 8.1, by 5:00 pm Mountain Daylight Time (MDT) on **July 15<sup>th</sup>, 2022**. The Notice of Intent to Bid may be submitted via email or facsimile to Louie Gonzalez at [louie.gonzalez@epelectric.com](mailto:louie.gonzalez@epelectric.com) or (915) 543-4073. Failure to submit a Notice of Intent to Bid may result in exclusion from participation in the bidding process.

It is the sole responsibility of the Bidder to ascertain that the Notice of Intent to Bid is received by EPE prior to the date and time specified.

Receipt of the Notice of Intent to Bid will be confirmed via e-mail response from EPE to the Bidder.

#### **4.3 Submission of Bidder Questions**

The deadline for submission of written RFP related questions will be **July 15<sup>th</sup>, 2022** at 5:00 p.m. Mountain Daylight Time to EPE's point of contact:

[louie.gonzalez@epelectric.com](mailto:louie.gonzalez@epelectric.com)

Any questions submitted after that deadline will NOT be addressed. EPE will prepare written responses to questions received and distribute the questions and responses to Bidders. Responses will be distributed to such Bidders with the question included but will not identify who originally submitted the question.

#### **4.4 Proposal Due Date**

All proposals must be submitted electronically to the Contract Negotiator, Louie Gonzalez, at [Louie.Gonzalez@epelectric.com](mailto:Louie.Gonzalez@epelectric.com) by 5:00 p.m. Mountain Daylight Time on **Aug 5<sup>th</sup>, 2022**. Any proposal submitted after the due date will be excluded from consideration. Proposals shall be as complete as possible.

Bidders are solely responsible for ensuring the proposals are received by EPE in accordance with the RFP instructions prior to the date and time specified, and at the place specified. EPE shall not be responsible for any delays in email, by transmitting errors, delays, or mislabeling.

#### **4.5 Tentative Date for Selection of Projects**

Following a review of technical information, Bidders' experience and feedback obtained from references, EPE will determine which, if any, of the proposals best meet EPE's objectives, and may initiate negotiations with those applicable

2022 EV Managed Charging Pilot Program RFP

Bidders. EPE will notify the selected Bidder/s on or before **September 8<sup>th</sup>, 2022**. EPE may choose to initiate negotiations with one or more Bidders.

#### **4.6 Tentative Date for Contract Discussions**

Should EPE choose to initiate negotiations with any Bidders, the tentative date for contract execution with the selected Bidder(s) is **September 30<sup>th</sup>, 2022**. Any contract between EPE and a Bidder will be conditioned upon regulatory approval by the applicable governmental agencies. EPE, at its sole discretion, reserves the right to reject any proposed contract(s) that result from this RFP for any reason including if subsequently issued regulatory approvals or authorizations are subject to conditions, including ratemaking treatments, which are unacceptable to EPE.

#### **4.7 Proposal Validity**

Each Bidder must hold its proposal open and valid for a period of one hundred and twenty days (120) days following the submittal or during the time necessary to complete contract negotiations and execution.

#### **4.8 Division of responsibilities**

This section identifies some, but not all, roles and responsibilities of EPE and the selected Bidder. Bidders will be expected to identify specific information needed from EPE, as well as additional responsibilities required by Bidders to successfully deploy and meet the objectives of this RFP. Bidders must describe the Program implementation plan, including but not limited to identifying required resources and associated costs, project management processes and procedures, Program implementation milestones schedule and change control procedures.

EPE's primary responsibilities will include the following:

- Provide any public information updates on EPE's Transportation Electrification Plan filings which may impact the requirements of this RFP,
- Provide interface for Bidder(s) systems integration to EPE's website or other systems;
- Develop and design the Program;
- Define load control parameters and conditions;
- File for PUCT and NMPRC approvals;
- Implement marketing materials and strategy;
- Coordinate load control schedules with selected Bidder(s);
- Provide interface for communications with the selected Bidder(s) systems;
- Provide minimum information technology requirements including cyber security requirements (please refer to Section 7.0);
- Evaluate program management processes throughout the term of the pilot program;

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- Implement statistical sampling of participating customers;
- Validate data reports provided by the selected Bidder(s) to evaluate and report Program deliverables to the state regulatory agencies.

Bidder(s) primary responsibilities will include the following:

- Describe in detail proposed managed charging Program with participation options for residential and commercial customers within EPE's Texas and New Mexico Service Territories.
- Provide a hosted or internal system/application that will be used for administration of the Program and customer enrollment.
- Provide all system functionalities specified in the Bidder proposal.
- Prepare and submit a marketing plan for EPE's review and approval
- Provide timely enrollment for participants
- Track participating customers' satisfaction levels, record reasons for customer claims, complaints, enrollment cancellations and provide reports to EPE.
- Collect customers participation information, opt out rates, EV charging data, perform post-enrollment load profile analysis and provide performance reporting to EPE.
- Provide EPE with a utility-web portal for the Program performance tracking, as well as associated training for EPE's staff.
- Provide answers to technical questions received during regulatory filing processes.
- Supply EPE customer information necessary for EPE to implement statistical sampling of customers.
- Provide EPE with forecasts of cumulative load shifting capability of enrolled customers.
- Acquire and maintain all applicable present and future licenses and meeting EPE's functional, technical and cyber security requirements necessary for operation of the proposed managed charging solution;
- Provide a customer web portal and/or mobile app, for ease of program enrollment.

## **5.0 SUBMITTAL PREPARATION INSTRUCTIONS**

### **General Information**

#### **a. Schedule**

Proposals shall be submitted in strict accordance with the RFP schedule.

#### **b. Extensions**

EPE will not grant any extensions to the RFP schedule and will not accept late proposals. Any proposal received after the scheduled date will not be considered and the Bidder will be notified of its elimination.

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**c. Reservation of Rights**

EPE reserves the right to accept or reject in its sole discretion any or all proposals for any reason at any time after submittal. EPE also reserves the right to select an offer that is not the lowest price, if EPE determines that to do so would result in the greatest value to EPE's customers.

**d. Failure to Comply**

Failure to comply with all requirements of this RFP may result in the rejection of the applicable proposal in EPE's sole discretion.

**e. No Liability**

Bidders that submit proposals do so without legal recourse against EPE or its directors, management, employees, agents, contractors or independent monitor based on EPE's rejection of any proposal or for failure to execute any agreement in connection with this RFP in law or equity, for any reason whatsoever relating to EPE's acts or omissions arising out of or in connection with this RFP. EPE shall not be liable to any Bidder or to any other party in law or equity. EPE further declares that it will incur no financial liability or obligation for Bidder's costs in preparing proposals.

**f. Return of Documents**

None of the materials received by EPE from Bidders in response to this RFP will be returned. All proposals and exhibits will become the property of EPE, subject to the provisions for confidentiality described in this document.

**Proposal Content**

Proposals must be prepared in accordance with the guidelines set forth in this section. Failure to follow the preparation instructions may result in the exclusion of the proposal from consideration.

Each proposal should be organized by section as described below. Each page of the proposal shall have the following information in top right corner.

- 2022 EV Managed Charging Pilot Program RFP
- RFP number: EPE-111080217-LG
- Bidder Name

**5.1 Proposal Content Requirements**

This section outlines the content and format requirements for proposals submitted in response to this RFP. Unless EPE in its sole discretion elects otherwise, proposals that do not include the information requested in this section

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will be ineligible for further evaluation, unless the information requested is not applicable or relevant to a given proposal. EPE reserves the right to conduct any further due diligence it considers necessary to fully understand and evaluate proposals.

## **5.2 Proposal Format**

A complete proposal will include a thorough written discussion about the proposed managed charging program, assembled in the following format:

- Tab 1 - Executive Summary
- Tab 2 - Program Description and Functional Requirements
- Tab 3 - High-level Program Implementation Schedule
- Tab 4 - Program Costs
- Tab 5 - Bidder Experience and Qualifications
- Tab 6 - Financial Information

### **Tab 1 - Executive Summary**

The Executive Summary should provide an overall description of the proposal. The description should include details about the type of managed charging program being proposed as well as key quantitative and qualitative benefits to EPE and its customers. The summary should specify how the program will engage EPE customers to participate in managed charging and describe estimated average load shifting capabilities, based on similar program results. The summary should also contain information on software capabilities to connect to vehicle telematics and EVSEs, as well as load shifting to off-peak hours, or times of excess renewable generation or low carbon hours.

### **Tab 2 - Program Description and Requirements**

All proposals must include a thorough description of the program including, but not limited to, the following:

#### **Program Description**

All proposals must provide a comprehensive description of the managed charging Program, including Program design, management and administration, customer enrollment, project milestones, load shifting, sample reports and other pertinent information, for both EPE New Mexico and Texas service territories.

- Describe functions and features of the managed charging systems proposed, including any relevant third-party partnerships that have been secured with automakers and EVSE providers, if applicable.
- Define if program interface will be hosted by the Bidder or the utility.



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- Provide any training requirements and schedule if EPE hosts the solution and associated costs.
- Describe load control capabilities that can be utilized for the proposed managed charging program.
- For event-based load control, please define event response time.
- Describe the expectation of EPE's infrastructure (server needs, database capacities, security requirements, etc.).
- Provide evidence of similar programs with an example of achieved load shifting or shaping, low carbon or renewable event results, including the load management parameters, number of customers enrolled, etc.
- Indicate if the proposed managed charging solution can allow for grouping and load control by geographical areas, average customer consumption, customer type, etc.
- Provide sample business cases, use cases, or financial analyses that add value to the proposal.
- Discuss program scalability potential.
- Describe if the proposed program incentive's structure will require integration with the utility's billing system (on-bill credits) or could leverage alternative incentive issuance mechanisms (e.g. gift cards, checks, money transfer, PayPal or Venmo credits, etc.) Please describe best practices deployed by other utilities.
- Describe the utility interface; provide graphics demonstrating utility's web-portal (if applicable).
- Provide graphics demonstrating customer-facing web-portal and/or mobile app for program enrollment and participation.

**Program Requirements**

At a minimum, proposals should describe the managed charging program proposal, solution functionality, types of load control technologies (makes and models of vehicles, EVSEs or other devices), software employed, and program performance reporting.

The following information should be discussed in this section, as applicable for the managed charging solution proposed:

- **Technical Requirements:**
  - Detail how your platform conducts vehicle/EVSE communication and managed charging functionality.
  - Provide a technical description of managed charging capabilities using vehicle telematics, networked EVSEs, and other major hardware and software characteristics.
  - Communication via Wi-fi or cellular networks required. El Paso Electric does not currently employ AMI in its service territory. However,

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proposals that include AMI based communications as an option for future integration may be submitted;

- For vehicle-based telematics managed charging, please specify the makes and models of all vehicles that can connect to the proposed managed charging platform for passive or active control of charging, and describe any limitations and relevant requirements (for example, if customer needs to purchase a premium Nissan Connect package, etc.) Also, please specify the makes and models that are in your roadmap for connection in the future, with an estimated integration timeline.
- For EVSE-managed charging, please specify the makes and models of EVSEs that can be connected to via your platform. Energy Star certified EVSEs are preferred.
- Describe the platform's maximum market reach as a percentage of on-road light-duty vehicles in EPE's service territory (e.g. 20% of all on-road EVs in the market can be managed using the proposed platform).
- Approach proposed may include installation of new managed charging capable EVSE or devices that add managed charging capability to existing EVs such as, but not limited to, On-Board Diagnostics (OBD)-II devices, or other innovative managed charging solutions.
- Summarize the commercial operating experience of the hardware/software proposed;
- Describe if managed charging system allows customers to manually over-ride the load shifting schedule or event;
- Describe any software forecasting capabilities;
- Describe warranties available for proposed software and/or hardware and associated costs (if applicable);
- Describe data collection devices and capabilities; define how the data will be transferred to the utility. State if there are any limitations to accessing the data by the utility.
- **Marketing and Customer Engagement Requirements:**
  - Describe utility's expected role in program marketing;
  - Describe program marketing plan and customer enrollment strategy;
  - Describe proposed managed charging customer incentive structure (enrollment incentive, monthly or annual participation incentive, equipment rebate, event-based, etc.);
  - Discuss the customer interface, provide graphics illustrating customer web portal and/or mobile app.
  - Describe if managed charging systems allow customers to manually over-ride the load shifting schedule or event;
  - Describe system controls over customer over-rides.
  - Describe available customer support.
- **Communications and Reporting:**

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- Describe how a managed charging signal will be delivered to the customer and the return path for communications back to EPE.
  - Describe necessary communication infrastructure for the proposed managed charging program.
  - Discuss the methodology of checking that communication signal is being received to ensure reliable operation.
  - Provide description of your existing and future communication system options and associated costs.
  - Identify if the proposed equipment can enable two-way communication with participating customers and how it is achieved.
  - Identify how the load shift will be measured.
  - Describe how the baseline usage will be estimated for evaluation of program impact.
  - Provide program result reports on effectiveness.
  - Describe the frequency and type of data that will be shared with the utility.
  - Specify if program information will be provided for individual devices or for an entire group of devices.
- **Managed Charging Solution Maintenance and Service Plan**  
Bidders shall discuss managed charging program maintenance and service plans in detail, which may include the following:
    - Current or expected system maintenance plan, including staffing, budget, management and control over IT platform, authority over the maintenance budget.
    - Cost of an annual service plan.
    - Maintenance and service guarantees and associated costs.
    - Managed charging system maintenance schedule such as frequency and length of maintenance and any required down time during specific hours.
    - Discussion of contracting for outside services, if applicable.
    - Any cost of mandatory and optional system upgrades to ensure ongoing compliance with changing industry standards.
    - Describe the frequency and duration of periodic system maintenance.
    - Identify equipment diagnostics capabilities, required frequency of diagnostics, and availability of remote or on-site diagnostics.
    - Describe the process and frequency of equipment and software upgrades. Identify how hardware and software will be maintained in accordance with industry standards.
  - **Cybersecurity Requirements:**  
Bidders shall describe and adhere to the following EPE's cybersecurity requirements:

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- Vendor shall provide summary documentation of the product's security features and security-focused instructions. Describe necessary software licenses and associated costs.
- Describe system architecture including cyber security standards (please refer to Section 7.0 for EPE's General Cyber Security Requirements).
- Describe the methodology for protecting customer or program sensitive information and recovery process in case of system security breaches. Share a SIG-Lite Questionnaire or SOC II report (if solution is hosted)?
  - Authentication and password management
    - a. Active Directory Integration?
    - b. SSO/Azure AD
    - c. Support for Multi-Factor Authentication
  - Authorization and role management:
    - a. Must support role-based access
- Audit logging and analysis:
  - a. Account activity must be logged
  - b. Must have time stamps and control access to audit trails and log files
  - c. Log export shall be supported
- Network, host and data security:
  - a. Do you support Conditional Access?
  - b. Firewalls
  - c. If multi-tenet, will EPE be separate from other tenets?
  - d. Multi-Factor?
  - e. Do you support VPN connectivity?
  - f. Types of end-point security (AV, Malware, EDR, etc.)
  - g. IDS/IPS/HIDS
- Patch Management and validation testing
  - a. How are vulnerabilities found and patched?
  - b. Is there a regular patch release schedule?
  - c. Vendor needs to provide appropriate software and service updates and/or workarounds to mitigate all vulnerabilities
- Cryptography and key management
  - a. Encryption at rest
  - b. Encryption in transit i. Must support TLS 1.2 and above
  - c. If Hosted, is it Azure, AWS, Google?
- Data validation and sanitization
  - a. Web Application Firewall support?
- Third party component analysis
  - a. What third-party components are required? (i.e. Java, .NET, Apache, etc.)
  - b. Does the system depend on any legacy applications that are no longer supported? i.e. End-of-Life Windows or SQL/Oracle versions
- Backup and Recovery
  - a. Explain Data Retention/Archival policies
  - b. Ransomware protection

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### **Tab 3 - Project Schedule**

All proposals must provide a detailed schedule of project development activities and target completion dates for hardware/software implementation, any training and program rollout for a 2-year pilot program. Describe the overall project development strategy and work breakdown structure that will ensure that the managed charging program can be implemented in time to meet the proposed online date during 2023.

Bidders must provide a high-level project development and completion schedule along with key milestone dates for program implementation.

### **Tab 4 - Project Cost**

Proposals must clearly state all components of the proposed managed charging program. Bidders must provide a breakout of the costs such as program implementation costs, licenses, marketing, administrative, and any hardware costs, etc.

### **Tab 5 - Experience and Qualifications**

The capability and experience of any Bidder must be demonstrated to provide assurance that the Bidder, and any other party involved in the proposal, has adequate competence, resources and skills. Each proposal must include the following information as a minimum.

- Description of technical and project management experience, specifically with respect to the implementation of managed charging programs like those proposed, and previous collaboration efforts with electric utilities, if any;
- Identify what systems are in production with other utilities and what systems are under development;
- Description of maintenance and service experience for similar type programs as contained in proposal;
- Description of managed charging programs marketing experience for similar type programs as contained in proposal;
- Description of completed projects and documented managed charging program results for similar type programs contained in proposal;
- List of references.

### **Tab 6 - Financial Information**

The financial viability of any proposal must be demonstrated to provide assurance that the Bidder, and any other party involved in the proposal, has

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adequate financial capability. Each proposal must include the following information at a minimum:

- Dun & Bradstreet (DUNs) number, if applicable;
- Most recent financial reports for the Bidder and any other parties involved, such as income statements, balance sheets and cash flow statements for the past three years;
- Investment rating of Bidder or its parent company by Moody's and/or Standard & Poor's, if applicable;
- Description of any current credit issues raised by rating agencies, banks, or accounting firms;
- A list all lawsuits, regulatory proceedings, or arbitration in which the Bidder or its affiliates or predecessors have been, or are engaged in, that could affect Bidder's performance of its bid
  - Identify the parties involved in such lawsuits, proceedings, or arbitration, and the final resolution or present status of such matters

### **Risk Management and Insurance Program**

Bidders shall provide a list of existing insurance contracts, listing policies by coverage, expiration date, insurer and limits per policy. Also, on a per coverage basis, provide current experience modifier and prior Loss History for the last three (3) years. Bidders shall also describe their Risk Management program if insurance coverage will derive from a parent company. Additional information may be requested based on information provided with the original proposal.

## **6.0 EVALUATION PROCESS**

EPE will assess the proposals to determine which, if any, will provide the most value for EPE's customers and the Company.

### **6.1 Proposal Review**

EPE will first determine if each proposal satisfies the threshold requirements summarized below. Those that do will be further evaluated through EPE's screening process described below. Only those proposals that satisfy the requirements of the screening process will be further evaluated. If at any time during the evaluation process EPE determines that a proposal does not meet its requirements, including timely submission of all documents pursuant to this RFP, EPE reserves the right to disqualify the Bidder's proposal and EPE will notify the Bidder accordingly during its notification process.

Favorable proposal characteristics include:

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- Completeness and Responsiveness – Proposals must meet all criteria set forth in the RFP. A thorough explanation of all aspects of the proposal should be included.
- Demonstrated ability to manage EV charging with multiple vehicle and EVSE makes and models;
- Cost-effectiveness of the proposed program;
- Program implementation plan;
- Customer-friendly, easy to use interface, overall customer experience, and customer support provided;
- Reporting capabilities that enable the creation of reports from the program, including customer specific data and the ability to provide those reports or data in a usable format to the Company;
- Evidence of Load Shifting from similar type programs;
- Experience and References- EPE seeks proposals from Bidders that possess extensive technical, marketing, and maintenance experience, and a history of successful projects of a similar nature;
- Financial Viability and Creditworthiness – Success of the project relies on the financial capabilities of all parties involved; Bidders should have a proven financial track record and be able to provide documentation that demonstrates access to financial resources required to complete the project;
- Scalability-EPE seeks proposals that will allow future program expansion.

## **Bids Evaluation**

### **Step 1 – Bid Eligibility Determination**

Each proposal will be reviewed to determine if it meets the requirements outlined in this RFP. The Company reserves the right to reject any, all, or portions of any proposal received for failure to meet any criteria set forth in this RFP. The proposal must be submitted on time and comply with the submission instructions.

### **Step 2 – Initial Bid Screening Process**

EPE will review each proposal for completeness in accordance with RFP requirements. Furthermore, the Company will evaluate if proposal meets EPE's managed charging pilot program objectives. EPE will take into consideration the proposed program design, managed charging solution technical and functional capabilities, overall project costs, Bidder's demonstrated competence and experience delivering similar types of programs, quality of proposed products and services, reference feedback and Bidder's financial capability.

### **Step 3 – Due Diligence Bid Evaluation and Short List**

The Company will conduct due diligence efforts primarily focused on those proposals that pass through the initial screening process described in Step 2.

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The Company will conduct other due diligence as part of the overall bid evaluation process, including, but not limited to, consideration of the following proposal characteristics:

- Managed charging pilot program design;
- Technical capabilities and quality of the proposed program, software and services;
- Cost and benefits of the proposed program to EPE and its customers;
- Bidder experience;
- Bidder's performance on previous projects with utilities/companies;
- Proposed project schedule and project execution planning;
- Bidder Roadmap and Future Proofing responses;
- Financial strength/credit worthiness of the bidder.

EPE will evaluate the proposals submitted and select the proposals for a shortlist.

**Step 4 – Shortlisted Bidders Presentations to EPE**

Shortlisted bidders will be invited to provide a presentation to EPE to demonstrate managed charging solution capabilities, including utility interface and customer interface on the mobile app and/or web portal.

**6.2 EPE's Selection of Bids and Discussions with Bidders**

**a. Evaluation and Selection**

After conclusion of the detailed evaluation of proposals and shortlisted bidders presentations, EPE may make a final selection of one or more proposals for negotiation of the managed charging program agreements. EPE will notify Bidders whose proposals are eliminated from further consideration.

**b. Right to Terminate Negotiations**

If EPE cannot reach acceptable agreement terms with the final selected Bidder or Bidders, EPE reserves the right to terminate negotiations with such Bidders and begin discussions with other Bidders, begin a new solicitation, or cancel this RFP. Furthermore, EPE, in its sole discretion, reserves the right to not select any proposals for negotiation of any agreement if warranted by its evaluation.

**7.0 TECHNICAL AND CYBER SECURITY STANDARDS**

If the proposed managed charging solution is a “hosted solution”, it will be subject to the following requirements:



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**7.1 Hosting Services.** Host shall provide EPE with access to any online Hosting System and will provide for the storage and retrieval of EPE data in connection with use of the hosting system.

**7.2 Access.** EPE users may include EPE employees, customers and contractors. EPE is responsible for the confidentiality and use of account names and passwords. Host shall deem any communication, data transfer, or use of the Hosting System received under EPE account names and passwords to be for EPE users benefit and use. EPE agrees to notify Host if account names or passwords are lost, stolen, or being used in an unauthorized manner. EPE represents and warrants that it has the rights to all EPE Data, including the right to upload EPE Data to the Host Server in connection with its authorized use of the Hosting System. EPE agrees that the customer data and its use do not infringe the rights of any third party and agrees to indemnify and hold Host harmless from any third-party claims of infringement as provided herein.

**7.3 Data Security.** When required, EPE agrees to access the Hosting System and to store and retrieve data using third party programs, including specifically Internet "browser" programs that support data security protocols compatible with those specified by Host. Host shall (i) back-up and maintain the security of EPE data using industry-standard back-up tools and data security protocols, and other methods reasonably deemed to be adequate for secure business data, (ii) notify EPE as provided in Section 7.1.4 in the event of a breach of security involving EPE user Data, and (iii) have in place a formal written security program that includes industry-standard policies and procedures for safeguarding EPE users data from loss, theft, and disclosure to unauthorized persons.

If EPE entrusts the Host with personally identifiable information or information deemed by EPE to be sensitive personal information, Host would agree to use reasonable measures to prevent the unauthorized processing, capture, transmission and use of the information that may be disclosed to Host during the course of the business relationship. Host would use reasonable measures to prevent unauthorized persons from gaining access to the data processing equipment or media where information is stored or processed. Host would agree to provide its employees and agent's access to information on a need-to-know or need-to-access basis only and agrees that any persons having authorized access to such information will be bound by obligations of confidentiality, non-use and non-disclosure.

**7.4 Data Breach Notification.** HOST shall notify EPE in writing of any breach involving Unsecured EPE users' data immediately upon becoming aware of such breach. All reports of breaches of Unsecured EPE users' data shall be made in compliance with applicable laws, unless otherwise directed by law enforcement officials due to any criminal investigation that may arise from such breach.

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In addition, Bidders proposing a "hosted solution" must provide the following information, if applicable:

- Use of Accounts; username passwords for access;
- Backup and maintain the security of EPE users' data;
- Notify EPE in the event of a breach;
- Have in place a formal written security program (provide a copy of written security program);
- EPE users shall retain ownership of the data stored or retrieved in connection with use of hosting system.

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## 8.0 NOTICE OF INTENT TO BID

**(Complete the Notice of Intent for each Project to be proposed)**

1. Company Name: \_\_\_\_\_

2. Company Address: \_\_\_\_\_

\_\_\_\_\_

3. Contact Person Information:

Name	
Title/Position	
Mail Address	
Courier Address (if different)	
Telephone Number	
Fax Number	
E-mail Address	

4. Project Facilities Proposed: \_\_\_\_\_

\_\_\_\_\_

5. Authorized Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

6. Date: \_\_\_\_\_

The Notice of Intent to Bid may be submitted via e-mail or facsimile to Louie Gonzalez at [louie.gonzalez@epelectric.com](mailto:louie.gonzalez@epelectric.com) or (915) 543-4073, or mailed to Louie Gonzalez, Contract Negotiator, at P.O. Box 982, Location 121, El Paso, Texas 79960. Receipt of the Notice of Intent to Bid will be confirmed in an e-mail from EPE to the Bidder. **This form should be delivered to the above address no later than 5pm Mountain Daylight Time (MDT) on July 15<sup>th</sup>, 2022.**

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## **9.0 NOTICE OF DISCLAIMER**

EPE has prepared the information provided in this RFP to assist interested persons and entities in making a decision whether to respond with a proposal. EPE reserves the right to modify, change, supplement or withdraw the RFP at its sole discretion. No part of this document or any other correspondence from EPE, its employees, officers or consultants shall be taken as legal, financial or other advice, nor as establishing a contract or any contractual obligations. All communication between Bidders and EPE shall be conducted in writing.

EPE makes no representations or warranties regarding the completeness of the information contained within the RFP and does not purport that this RFP contains all of the information needed for Bidders to determine whether to submit a proposal. Neither EPE nor its employees, officers or consultants will make, or will be deemed to have made, any current or future representation, promise or warranty, expressed or implied, as to the accuracy, reliability or completeness of the information contained within the RFP or any other information provided to Bidders.

Bidders who submit proposals do so without legal recourse against EPE, or EPE's directors, management, employees, agents or contractors, due to EPE's rejection, in whole or in part, of their proposal or for failure to execute any agreement with EPE. EPE shall not be liable to any Bidder or to any other party, in law or equity, for any reason whatsoever related to EPE's acts or omissions arising out of, or in connection with, the RFP process.

Bidders who submit proposals do so without legal recourse against EPE, or EPE's directors, management, employees, agents or contractors, due to EPE's rejection, in whole or in part, of their proposal or for failure to execute any agreement with EPE. EPE shall not be liable to any Bidder or to any other party, in law or equity, for any reason whatsoever related to EPE's acts or omissions arising out of, or in connection with, the RFP process.

EPE reserves the right to reject, for any reason, any and/or all proposals. EPE further reserves the right to waive any irregularity or technicality in proposals received, or to consider alternatives outside of this solicitation, at its sole discretion, to satisfy its load savings goals and customer needs. In addition, EPE reserves the right, in its sole discretion, to modify or waive any of the criteria contained herein and/or the process described herein.

No Bidder will have any claim whatsoever against EPE, its employees, officers, or consultants arising from, in connection with, or in any way relating to this RFP. Without limiting the generality of the foregoing, each Bidder agrees, by and through its submission of a proposal, that rejection of a proposal will be without liability on the part of EPE, its employees, officers, or consultants, nor shall a

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Bidder seek recourse of any kind against any of the foregoing on account of such rejection. The filing of a proposal shall constitute an agreement of the Bidder to each and all of these conditions. Each Bidder and recipient of this RFP is responsible for all costs incurred in evaluating, preparing and responding to this RFP. Any other costs incurred by any Bidder during negotiations are also the responsibility of the Bidder.

SOAH DOCKET NO. 473-24-04312  
PUC DOCKET NO. 54614

APPLICATION OF EL PASO	§	BEFORE THE STATE OFFICE
ELECTRIC COMPANY FOR	§	
APPROVAL OF TEXAS ELECTRIC	§	OF
VEHICLE-READY PILOT	§	
PROGRAMS AND TARIFFS	§	ADMINISTRATIVE HEARINGS

EL PASO ELECTRIC COMPANY'S RESPONSE TO  
COMMISSION STAFF'S  
FIRST REQUEST FOR INFORMATION  
QUESTION NOS. STAFF 1-1 THROUGH STAFF 1-8

STAFF 1-6:

Please admit or deny that EPE will own the software and any related equipment used to implement the EV Smart Rewards pilot program.

RESPONSE:

Deny. EPE will not have ownership to the software and any related equipment used to implement the EV Smart Rewards Pilot Program. The selected vendor will be providing a turnkey software-as-a-service solution to EPE. The electric vehicle and charging equipment will be owned by EPE's customers.

Preparer: James Pleasant

Title: Staff Engineer- Electrification

Sponsor: Angelina Rodriguez

Title: Supervisor- Electrification

SOAH DOCKET NO. 473-24-04312  
PUC DOCKET NO. 54614

APPLICATION OF EL PASO	§	BEFORE THE STATE OFFICE
ELECTRIC COMPANY FOR	§	
APPROVAL OF TEXAS ELECTRIC	§	OF
VEHICLE-READY PILOT	§	
PROGRAMS AND TARIFFS	§	ADMINISTRATIVE HEARINGS

EL PASO ELECTRIC COMPANY'S RESPONSE TO  
COMMISSION STAFF'S  
FIRST REQUEST FOR INFORMATION  
QUESTION NOS. STAFF 1-1 THROUGH STAFF 1-8

STAFF 1-7:

Please admit or deny that the software and any related equipment used to implement the EV Smart Rewards pilot program are vehicle-charging facilities or other transportation electrification and charging infrastructure.

RESPONSE:

Deny. The software and any related equipment used to implement the EV Smart Rewards pilot program is used to schedule the individual customers charging through either customer-owned electric vehicle telematics or vehicle charging equipment.

Preparer: James Pleasant

Title: Staff Engineer- Electrification

Sponsor: Angelina Rodriguez

Title: Supervisor- Electrification

SOAH DOCKET NO. 473-24-04312  
PUC DOCKET NO. 54614

APPLICATION OF EL PASO	§	BEFORE THE STATE OFFICE
ELECTRIC COMPANY FOR	§	
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PROGRAMS AND TARIFFS	§	ADMINISTRATIVE HEARINGS

EL PASO ELECTRIC COMPANY'S RESPONSE TO  
COMMISSION STAFF'S  
FIRST REQUEST FOR INFORMATION  
QUESTION NOS. STAFF 1-1 THROUGH STAFF 1-8

STAFF 1-8:

Please refer to page 16 of the Direct Testimony of Angelina Rodriguez. Please detail the estimated costs for “utility-side” upgrades necessary to implement the PowerConnect pilot program, if not separately identified and included in the response to Staff 1-1.

RESPONSE:

See EPE’s response to Staff 1-1

Preparer: Edwin Martinez

Title: Project Manager- Electrification

Sponsor: Angelina Rodriguez

Title: Supervisor- Electrification