



**RESPONSE TO RFP:
BEXLEY COMMUNITY CHOICE AGGREGATION CONSULTANT**

The City of Bexley
Ben Kessler, Mayor

March 1, 2023



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Consultant Selection Committee City of Bexley
Bexley, OH 43209

RE: Electrical Aggregation Broker Request for Qualifications

Committee Members:

The selection of the best partner to design, implement, and service a successful community aggregation program is of paramount importance to the success and benefit of the City of Bexley and its residents. The following proposal, developed by Trebel Energy, is the effort of industry veteran Scott Belcastro, CEO of Trebel, along with a team of equally experienced supporting partners. Together, our team will leverage its experiences and expertise, along with our deep industry relationships, to ensure a successful Bexley aggregation program.

In this proposal, Trebel will highlight its unique qualifications to design and implement a community aggregation program that not only achieves stated program goals, but exceeds expectations and delivers value to benefit residents.

Trebel was founded in 2010 as an unbiased internet platform for consumers to learn about deregulation and compare supplier offers for their home or business. It quickly became a leading consultant in the industry, and local municipalities took notice. Trebel evolved to focus its expertise on building governmental aggregation programs.

Currently, Trebel has successfully implemented over 160+ combined electric/natural gas aggregations behind nine different utilities, using eight different suppliers in Ohio. These programs, in aggregate, encompass 360,000 residential customers consuming nearly 4 billion kWh of electricity annually and saving residents tens of millions of dollars. Today, Trebel continues to grow the number of communities it services at record pace.

Since Trebel's inception, Trebel has repeatedly set the lowest rate in the state. This has been achieved through strong supplier relationships, an organized RFP process, and a keen understanding of the market.

Procuring stable, cost-effective electricity is mission critical, but equally important is creating a program that supports community initiatives and provides the greatest benefit to consumers.

Further, Trebel's leaders understand the laws, policies and political landscape associated with government aggregation, in addition to pending rules and laws that affect consumers. All program and campaign costs and services are provided at no cost to Bexley.

Trebel has invested heavily in technology to provide world-class services, such as savings proposals, validation reporting and contract management, that benefit administrators and consumers.

It takes a team of professionals to provide the community outreach, marketing, education and ongoing support of energy users to ensure a successful and sustained transition. The Bexley community outreach program will include "boots on the ground" to field concerns and provide ongoing education for constituents.

We are confident the innovative plan contemplated by the City will be best implemented by Trebel, and we are eager to craft a custom-tailored aggregation plan and supplier RFP that will be recognized for its innovative approach. We welcome the opportunity to discuss with the City any facet of this proposal and can be reached at the contact information below.

Sincerely,

Scott Belcastro
CEO
Trebel, LLC
Phone: (614) 425-4885
Email: scott@electricsuppliers.com

I. BACKGROUND

On January 14, 2021 the City of Bexley submitted its application to become a governmental aggregator to the PUCO, case 21-0049-EL-GAG. On February 14, 2021 the PUCO issued the City a Competitive Retail Electric Service Provider Certificate.

The Mayor's Office of Bexley issued a Requested for Qualifications due by March 1, 2023.

Interested parties should provide the following:

- Agency profile including qualifications and team leads
- List and details of municipal electrical aggregation programs brokered by the agency
- Proposed compensation/fee structure

Trebel believes it is best suited to partner with the City of Bexley to achieve these goals based on the following experiences and qualifications:

- To date, Trebel has successfully implemented over 160 aggregations behind 9 different utilities in Ohio.
- Trebel has set the lowest rate or highest discount in the market numerous times in the last eight years.
- Trebel developed a proprietary process that has a proven track record of obtaining quality bids and addresses every aspect of the negotiations.
- Trebel prides itself on its investment in the success of the program. It is dedicated to serving as a partner to the City of Bexley.

II. 5.6.2 LOCATION LEAD CONSULTANT

Trebel is a registered PUCO Consultant I Broker with its office located at 1216 Lexington Ave., STE 301, Mansfield, Ohio.

Trebel employees and contract staff include the following:

- Scott Belcastro, Principal
- Scott Raffeld, Operations Manager
- Alan Bannister, Communications and Outreach Support
- Daniel van Hoogstraten, Communications Specialist
- Kim Bojko, Legal Counsel

III. 5.6.3 PROJECT TEAM COMPETENCE

Scott Belcastro

Scott Belcastro is the founding member of Trebel, LLC and has grown the company to one of the largest governmental aggregators of residential electricity accounts in Ohio serving over 360,000 residential clients totaling nearly 4 billion kWh of annualized electricity load. Prior to founding Trebel, Belcastro worked as a relationship manager

for a leading regional bank where he gained experience in working with energy-related clients in the fields of electric, oil, natural gas and renewable energy in various debt and equity raising capacities. Belcastro has been able to leverage his banking relationship-building tools to execute successful governmental aggregation programs, including:

- Meeting and appearing before the Public Utilities of Ohio (PUCO) to provide input from his real-world experience to improve the aggregation process and as a consumer advocate/voice for program users to bring greater balance in the process.
- Working in contract negotiations, power purchase agreements, financing arrangements, and advising clients on complex issues such as energy markets.
- Guiding his company from zero aggregations in 2011 to a leading provider of aggregation services in just eight short years.

Due to the successful business model Trebel is now nearly twice as large, in some cases nearly four times, as a number of other firms that have been in the space for double the number of years.

Belcastro graduated from Kent State University (KSU) with degrees in business administration, economics and finance, and earned a Masters in Business Administration from KSU.

His specific responsibility on the project will be program design, communication with Mayor and Council and, working with third party suppliers intending to bid on the program.

Project Staff

Scott Raffeld

Scott joined the Trebel Energy family with nearly ten years of community aggregation experience. He worked for Volunteer Energy prior to joining the Trebel. At Volunteer Energy, he started out answering phones and reviewing contracts. He worked his way up to head the aggregation team at Volunteer Energy. He managed over 160 programs and became a mapping expert, making sure residents were included in each program.

Scott now handles all back office needs at Trebel Energy. From making sure each community is certified with the PUCO, to answering customer requests. Scott's main goal is to make sure each program runs smoothly. He is the main contact between the community and suppliers. He ensures that if there is a question, Scott will find the answer. Scott recently became a notary, which helps with the process of becoming certified with the PUCO.

Scott also has more than 20 years of customer service experience and thrives on helping people. Scott is always willing to go the extra mile for the community. When Scott is not in the office, he loves to travel and see live music with his daughter and wife.

Kim Bojko

Kim Bojko is Trebel's lead energy counsel and is one of Ohio's most experienced lawyers in all areas of utility regulation. Bojko has extensive experience with power agreements, purchase and sale agreements, complex rate cases, restructuring of the electric industry, and advising clients on issues affecting the price and availability of energy services. She has negotiated multifaceted state and federal matters and contracts with utilities, consumer groups, and other regulatory stakeholders. Bojko formerly served as chief of staff of the Public Utilities Commission of Ohio, in addition to several other legal and leadership positions at the Commission starting in 2003.

As an advocate, her practice has included representation of consumers and suppliers of regulated and competitive natural gas, electricity, telecommunications, and water services before the PUCO, Federal Energy Regulatory Commission, Supreme Court of Ohio, and the U.S. Court of Appeals, District of Columbia. As a regulator, Bojko developed and implemented legislative and policy initiatives on state and federal matters, acted as a regulatory affairs liaison with other state agencies, utilities, and stakeholders, developed economic development initiatives, participated in day-to-day operations of a 400-person agency, and presided over complex cases in all areas of the PUCO and Ohio Power Siting Board. She mediated residential and commercial customer complaints, oversaw regulated enforcement activity, and drafted rules and regulations to implement Amended Substitute Senate Bill 221 and reform the electric service and safety standards. She will devote time, as needed and requested.

Alan Bannister

For nearly 25 years, Alan has worked in government and politics in Ohio. He served as a Director, Manager, and Executive Assistant for five Toledo mayors, where he worked on civic engagement, small business, and smart cities initiatives, and was responsible for the city's office of diversity and inclusion, the Board of Community Relations, and the Toledo Youth Commission. In Governor Ted Strickland's administration, Alan was Northwest Ohio Regional Director and managed projects for Faith-Based and Community Initiatives. He was the Ohio Political Director for President Biden's presidential campaign in 2020 and Secretary Clinton's presidential campaign in 2016. He was also part of the Ohio political teams for President Obama's presidential campaigns in 2008 and 2012. Alan has been a regional political coordinator for every Ohio gubernatorial campaign since 2006.

Daniel van Hoogstraten

Daniel brings more than a decade of experience at the intersection of communications, politics, and government. He translates his experiences working on campaigns and with elected officials to serve Ohio and national clients. He was the State Director for a large-scale, statewide political and issue advocacy organization. He was also a spokesman and advisor for U.S. Senate and U.S. House campaigns in Ohio, Texas and West Virginia. Additionally, on Capitol Hill, Daniel served as Communications Director to two senior members of the U.S. House of Representatives — Congressman Frank Pallone (D-NJ), the top Democrat on the House Energy and Commerce Committee, and Congresswoman Eleanor Holmes Norton (D-DC). He was also a part of a small government affairs team in D.C. focused on agriculture and energy policy. He lives in Bexley, Ohio with his wife Molly and their children.

IV. 5.6.4 STATEMENT OF UNDERSTANDING

Understanding of Scope of Work

The City of Bexley is seeking an energy consultant to assist with re-establishing and administering a Community Aggregation program. A successful consultant will be able to manage all phases of the program, including assistance with selection of the supplier, creation of opt out letters, administrative filings with the PUCO, maintenance and customer service of accounts, as well as ongoing reporting to the City of the program's performance and metrics.

Energy is complex, and successfully educating and servicing the residents on the Community Choice Aggregation is an important factor in the long-term success of the program. Trebel believes when dealing with such a diverse population as Bexley the easier it is for customers to get answers the more satisfied customers will be with their energy provider and, ultimately, the administrators implementing the program.

Direct Public Engagement

With such a diverse multi-generational population in the City of Bexley, Trebel shall craft a multi-tiered approach to resident outreach, including direct mail, online, and in-person communications for the education, implementation and support phases of the program. We would work with the City of Bexley team to ensure the most effective approach to target the greatest number of residents.

During the education and implementation phases Trebel will leverage its industry leading in-house professionals to provide residents:

- A dedicated phone number to reach Trebel customer service representatives.
- A dedicated email address for residents to address issues and opt-out, opt-up or opt-down.
- Assistance with website designed for customer education as well as the ability to opt-out, opt-up, and opt-down online.
- Direct mailings to those individuals not initially "eligible" for the program.
- Develop and execute social media outreach and educational program.

Trebel knows that educational services continue through the life of the contract. It has developed a proprietary communications program that has resulted in increased customer participation. This helps with greater program awareness and satisfaction.

Supplier RFP and Cost Containment Measures

Trebel's proprietary RFP process has saved its customers millions of dollars. In light of the upcoming utility rate increase we recommend initiating the acquisition of bids quickly to meet the June 1st start date. This date coincides with start of the increase in utility rates.

Our typical RFP process for future programs typically takes three to four weeks to complete and includes negotiations with the supplier chosen by the City to create a Management Service Agreement (MSA). Trebel has previously worked with all the suppliers, with the exception of one, serving governmental aggregation programs

within the state of Ohio to create a customer-focused MSA. Trebel's involvement in the creation of MSA's has already proven itself in the market and saved residents collectively hundreds of thousands of dollars. More importantly, it minimized disruptions in the program and provided price stability.

Trebel knows how each successful supplier rolls out its programs and understands the nuances of working with each supplier. Our team has previously addressed any issues with them on existing programs, having negotiated and worked with them in the past. Additionally, the City benefits from Trebel's ability to be more responsive to market movements as this will help cut down on the time needed for negotiations. All our agreements have been reviewed by Bojko for legal compliance (both PUCO and other state requirements). Once a signed agreement has been completed with the supplier, we begin the process of creating the opt-out letters to be sent to constituents. Trebel has a template opt-out letter with effective and proven messaging that will be supplied to the City.

Post Supplier Selection Implementation

Once the supplier has been agreed upon, Trebel will take care of the docketing of opt-out letters required by the PUCO, which again requires a 10-day wait period. After 10 days, letters are sent out to the residents and Trebel's service staff will assist with answering calls by constituents with questions and concerns. After the 21-day period, the supplier will submit the customer list to the utility, and they will begin to switch customers to the new program.

Once the program is operational, Trebel will begin using its proprietary web portal to create, track, and report results from the program to the City. This enables us to not only manage the entire process more efficiently but also provide better customer service and new services for constituents.

City officials will have direct and immediate access to information regarding their aggregation program and can quickly report to the community leaders how the program is performing. Trebel manages all the ongoing certification renewals, quarterly/yearly PUCO reporting and pays for all the yearly PUCO/OCC fees so the City's program runs flawlessly year-after-year. Our customer representatives will be on hand year-round to service residents. This in-house direct access service is invaluable to the community as it significantly improves customer satisfaction of the program.

Every one of Trebel's staff contribute to the success of each one of our community aggregation campaigns. Drawing from years of taking customer service calls, Trebel's literature, communications, and processes have been developed to communicate more effectively and efficiently the specifics of the program.

In addition to the scope of work outlined above, the City's program should be created with three primary goals in mind:

- **Competitive Rates:** As stated earlier, Trebel has set the lowest rate or highest discount in the market numerous times in the last eight years. This has been achieved through strong supplier relationships, an organized RFP process, and a keen understanding of the market.

- **Sustainability:** A second goal of the program is the advancement of a sustainability economy. Discussions begin with how to achieve the maximum level of sustainability, with a competitive price, and on a robust timeline to be implemented.
- **Service:** The third and final goal of the aggregation program is that customers are receiving world-class service from the suppliers serving the program. To date, Trebel is the only known consultant that has worked with all but one supplier to service government aggregation customers in Ohio. Furthermore, Trebel created its own controls to ensure better service (more responsive and with a clearer message) for customers. This has taken years of experience to gain this understanding for the benefit of the City's program. In addition to the suppliers customer service, Trebel has long since had its own customer service representatives that are in place to help customers. They've been trained to "do the right thing" on behalf of the customers. For us "doing the right thing" means helping each customer get where they want to go quickly and efficiently, even if it means they will not be a customer within the program at this time.

Draft Schedule

Trebel has a strong history of efficiently rolling out aggregation programs throughout Ohio and we will be ready to begin assisting the City day one. Below we have created a tentative schedule of program development from inception to post implementation.

Aggregation Phase	Timeline
Trebel hired.....	March 2023
Supplier Request for Bids.....	March/April 2023
Supplier/program approval	April 2023
Opt out letters filed with PUCO (10-day waiting period).....	April 2023
Opt out letters sent to customers (21-day wait period).....	May 2023
Program start date.....	July 2023
Supplemental program letters sent to customers.....	TBD
-Quarterly	

Trebel is eager to partner with the City of Bexley to achieve an innovative, industry-leading RFP. Through its 160+ successful aggregations Trebel has developed a proprietary process that has a proven track record of obtaining quality bids and addresses every aspect of the negotiations. While we recommend expediting this process in Bexley's case many of the existing topics can still be implemented.

Major topics addressed are:

- Procedures
- Terms and Conditions
- Regulatory Compliance (extremely important)
- Financial Representations
- Community Load Data Estimates
- Ongoing Reporting Requirements

Trebel will work with the City to determine the desired services and features to be included in the selection of a supplier, and it will make recommendations on qualifications necessary to be a bidder.

As part of its normal supplier selection process, Trebel will gather the load data information from AEP Ohio (Utility) and compile it in a user-friendly format for suppliers. It will carefully scrub out all ineligible accounts according to the PUCO rules and pass the information along to suppliers. This second set of eyes acts as a buffer to prevent incorrect communications later. Further, Trebel utilizes software to plot all the potential customers on a map to ensure only those within the incorporated areas of Bexley will be included. This cuts down on the number of mistaken mailings and thus complaints.

Once bids have been obtained, Trebel will then meet with the City to review and walk through each proposal in a method to ensure all terms are understood. This process allows for the best solution to be realized. Typically, at this point, Trebel requests City Council make a motion to approve moving forward with a specific program (i.e. a supplier and a term). In rare cases, Trebel may recommend an interview with a potential supplier for further clarification on its plan. After the potential interviews and reference checks, Trebel will recommend a final price refresh and any other modifications deemed necessary by the City to select a successful bidder.

Every RFP Trebel issues requests from the suppliers the ability to have renewable energy options. Trebel's commitment to sustainability and cost savings was realized in a 100% renewable energy community aggregation program in AEP Ohio territory that achieved one of the lowest rates in the state.

VII. APPENDIX

List and details of municipal electrical aggregation programs brokered by the agency

As previously mentioned, Trebel works with over 120+ communities with over 160+ combined electric and natural gas programs within 27 Counties in the state of Ohio. Due to competitive reasons, we will only provide a short list of programs we currently manage in the territory closest to the City of Bexley.

Madison Township, Franklin County—Client since 2012, roughly 6,000 households (includes Groveport City)

Pleasant Township, Franklin County—Client since 2014, roughly 2,900 households

Other in Franklin County include Prairie Township, Hamilton Township

**City of Columbus, Franklin County—Client since 2020 (Likely the 2nd or 3rd largest energy aggregation in the United States), over 300,000 potential households

Genoa Township, Delaware County—Client since 2017, roughly 8,000 households

Berlin Township, Delaware County—Client since 2013, roughly 2,500 households

Proposed compensation/fee structure

Typical to our industry, Trebel suggests a per kWh compensation structure, no money to be paid by the City. Our minimum compensation would be \$0.0005 / kWh depending on the level of services the City asks of Trebel. Similar to an insurance agent, the payment for Trebel comes from the Supplier, and we do not recommend simply choosing a firm with the lowest compensation. Energy is a service-related industry and compensation is commensurate with the level of services provided.

VII. APPENDIX

Appendix A: Trebel/ Scope of Work

- A. Act as the Client's agent, which will be strictly limited to an electric and natural gas rate analysis, electric and natural gas aggregation formation and operation, electric and natural gas procurement.
- B. Assist the Client in managing its energy needs by designing a program that is designed to achieve an overall reduction and/or provide price certainty in energy costs for the government entity and its citizens. Review and evaluate the current cost of energy for the Client and its citizens and explore numerous options to determine the best program to meet the needs of the Client.
- C. Assist the Client in creating, conducting, implementing, and managing a governmental aggregation program to satisfy the Client's needs.
- D. Assist the Client in becoming certified by the PUCO as a governmental aggregator and/or obtaining renewal certification.
- E. Design governmental aggregation materials and notification forms and provide marketing support in consultation with the selected energy supplier.
- F. Upon request, attend governing body or other public meetings as necessary.
- G. Assist in the collection of customer load data and verification.
- H. Provide estimates of energy savings under the governmental aggregation program as designed.
- I. Monitor the governmental aggregation program and provide updates on the program and metrics that have been achieved.
- J. Develop and administer the Request for Proposals (RFP) process.
- K. Act as the contact with all potential energy suppliers.
- L. Pre-qualify any energy suppliers wishing to bid on the RFP.
- M. Manage all contract negotiations with the selected energy supplier.
- N. Oversee the customer enrollment and switching process to the selected energy supplier from the regulated utility.
- O. Coordinate the filing of any reports required to be filed at the PUCO with the Client and selected energy supplier.
- P. Coordinate all appropriate energy, financing, and technical experts.
- Q. Provide consultation for energy buying practices and regulatory matters.
- R. Provide such other services reasonably related to the foregoing and mutually agreed to among the Client and the Trebel.