



ABAG

BAY Regional
AREA Energy
Network

“Bay Area communities working together for a sustainable energy future.”

INQUIRY RESPONSES & CLARIFICATIONS

Request for Proposals **Single Family Home Upgrade - Implementation and Related** **Services and Regulatory Support**

Release Date: July 18, 2016

Response Deadline: August 22, 2016, by 3:00 p.m.

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The following inquiries were received by BayREN by the associated deadline of 3:00pm on July 28, 2016. The full Request for Proposals, this document and all Addenda may be found online at <http://abag.ca.gov/contracts/ace.html>. Completed proposals must be received to JennyB@abag.ca.gov by 3:00 p.m. on August 22, 2016.

1. Q: Section V.B.8 of the RFP requests a “fee proposal... that includes ... years of experience for all team members” to be provided in the Fee Worksheet (Exhibit A), however, Exhibit A does not have a column for “years of experience”, and only lists “Position”.
 - a. Should bidders add a column FOR “years of experience”?
 - b. Should individual staff be named in the Fee Worksheet, or can a range of experience be offered by “Position”?

A:

- a. **A revised Fee Worksheet has been posted to the ABAG website.**
 - b. **Range of experience by position is acceptable.**
2. Q: In Exhibit A/Column B under “Estimated Hours,” Cell B3 reads “(as a percentage of sample project).”
 - a. Is it correct that BayREN does not want to see the actual estimated number of hours per position in this column, but, would rather see, for example, 6% or 14%?
 - b. If BayREN wants to see a percentage (for example, 6% or 14%), can BayREN confirm how it is expecting bidders to calculate the “Totals” in Column D and Row 32? As currently structured, a “Total” cannot be calculated based upon a percentage and an hourly rate.

A:

- a. **Correct.**
 - b. **A revised Fee Worksheet has been posted to the ABAG website that removes the Total column.**
3. Q: Exhibit A asks for a single rate by job position. The RFP in Section VIII.A states that awarded contracts may extend through Dec. 31, 2019. If bidders propose their 2017 labor rates in Exhibit A, will firms awarded work be able to work with ABAG to adjust labor rates for 2018 and 2019 if the contract is extended through these years? If not, is ABAG expecting bidders to propose a blended rate by position that would be valid through 2019?

A: Yes. If the contract is extended beyond 2017, bidders may adjust their labor rates.

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4. Q: Does the ~\$1.2 million annual budget for implementation and advising services align with the current program volume communicated in the RFP (i.e., 175-245 HU projects and 100 AHU assessments per month), and is it inclusive of the work scope covered in Parts One, Two, and Three?

A: Yes.

5. Q: Would BayREN be willing to amend the RFP to allow firms that can document having started PG&E’s data security clearance process as being eligible to bid on Program Element Part 1?
- a. If so, can BayREN clarify the specific PG&E process required for data security clearance and PG&E point of contact for this process, and what documentation would be acceptable to demonstrate that we’ve started this process?

A: Yes. Please see Addendum 1 posted on the ABAG website.

- a. **BayREN will provide the point of contact with PG&E. Bidders shall work with PG&E regarding the process.**
6. Q: Does the Implementation Plan page limit of 6 pages apply to firms bidding on all four Program Elements?
- a. Is it appropriate for the RFP to be updated to specify a 6-page limit to apply to EACH Program Element, therefore allowing a firm that is applying on all four Program Elements an Implementation Plan of 24 pages?
- b. If we have appendices (after the proposal page limit) to provide additional information such as full resumes, will these be included in BayREN’s review?

A: Yes.

- a. **No.**
- b. **Yes.**
7. Q: Could you please expand on goals and what percentage of budget is targeted for incentives versus implementation? We understand a final budget has not been set, but would like to better understand the dollars available for the actual work.

A: We cannot predict what our approved budget will be for 2017. This was our approved 2016 Single Family program budget which includes Tasks One – Three (except for EMV). Note that this budget includes the BayREN members’ administration, implementation and marketing budgets:



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Administration	\$378,562
Implementation	\$1,545,659
Marketing & Outreach	\$870,263
Incentives	<u>\$2,000,000</u>
Total Single Family Budget	\$4,794,484

We received an additional \$3.7M in incentive funds in 2016. The advice filing will likely request the same amount of funding with an increase in the incentive amount.

8. Q: How is the program structured today? For example, are local agencies involved?

A: The current structure, which will likely remain, is that implementation is handled by consultants as is a small amount of regional marketing (i.e. website, development of collateral). BayREN member agencies do the majority of local marketing and outreach. The Home Upgrade Advisor is a vendor.

9. Q: Who is doing the implementation/field services? What is the extent of the implementation work that will need to be done? Or is marketing and rebate processing expected rather than actual in-home installation? Would the winning vendor be the primary manager of the program?

A: ICF International is the current implementer. Your proposal should indicate how you would implement the program. Please review <https://www.bayareaenergyupgrade.org/> to gain an understanding of this program. There, you will see that participating contractors do the in-house work. No, the winning bidder will not be the primary manager of the program; that is handled by ABAG and a BayREN member agency.

10. Q: For EM&V: Would the winning vendor perform or support?

A: Both.

11. Q: Regulatory Support: Is there detail on the nature/extent of this support that will be needed?

A: Keep abreast of relevant state proceedings including attending workshops and hearings; provide strategic guidance on focus areas, funding options, etc., and develop comments. Additional details are found in the RFP.

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12. Q: We understand that the exact scope of regulatory support is not determined. Can you indicate some examples of which state and federal proceedings BayREN would like to participate in? Also, do you anticipate that the scope of the services here will include (1) in-person participation in workshops and hearings and (2) drafting filings? Will BayREN require filings be reviewed and submitted by a California bar-certified lawyer?

A: Examples of proceedings would include those at the CPUC and CEC that have relevance to the BayREN mission. The Integrated Demand Side Management at the CPUC and the Existing Buildings Energy Efficiency Action Plan proceeding at the CEC are specific examples. BayREN will request in person attendance at workshops and hearings and assistance with drafting filings. These services do not require that the person(s) be an attorney.

13. Q: With regard to the coordination of regional marketing services with statewide ME&O, is there a specific anticipated frequency of collaboration (e.g. monthly coordination meetings) or specific campaigns on which collaboration is expected?

A: BayREN has a designated statewide ME&O staff lead. This task requires that all regional marketing be done in coordination with statewide campaigns. It is not anticipated that the bidders attend or participate in statewide ME&O meetings, but rather that they coordinate when necessary with the BayREN lead to ensure consistency with the statewide efforts and guidelines.

14. Q: The RFP states that Energy Orbit or a compatible platform should be used. Would it be acceptable to entirely replace Energy Orbit with another platform providing an equivalent or better level of service? Or would any other platform introduced be expected to integrate with Energy Orbit? If replacement with another platform is acceptable, would BayREN need to own the license for that system or could the implementer own the license and provide BayREN access?

A: As long as data can be transferred, a different platform may be used. Either integration or replacement of the platform is acceptable. The ownership of the license can be the subject of contract negotiations. At least two BayREN staff would require access to the system.

15. Q: If bidder proposes on all four tasks, will the page limit be different?

A: No.

16. Q: What is the expected term of contract? The contract term will be for one year.

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A: The contract term will be for one year. See Part VIII (A).

17. Q: In the Team Qualifications section, will only short bios be expected, or will full resumes be allowed and not count toward page limit?

A: A short bio is expected. Bidders may also provide resumes which will not be counted towards the page limit.

18. Q: Please explain the differences between the Contractor Qualifications and Experience with Similar Projects sections.

A: The differences in these sections are clear. No further clarification will be provided.

19. Q: Please clarify what is meant by “notify finalist” on September 14th. Is this a notification of successful bidder or finalist selected for interview?

A: The successful bidder will be notified on September 14th. BayREN does not anticipate conducting interviews.

20. Q: What is BayREN’s preference in the proposal format if bidder bids on more than one task? One proposal that includes multiple tasks, or one stand-alone proposal per task?

A: BayREN does not have a preference. However, be mindful that the page limit is combined and is not per task.

21. Q: Considering the draft ruling’s direction on designating Home Upgrade as a statewide program, does that change any aspects of this RFP?

A: BayREN is unaware of a ruling that designates Home Upgrade as a statewide program; the recent Proposed Decision mentions this program only as an example of a statewide pilot. As BayREN is regulated by the CPUC, changes to funding and implementation of any of our programs is subject to CPUC decision.

22. Q: If a bidder wants to bid on more than one task, should the budget spreadsheet be reformatted to identify costs per task? Currently the budget spreadsheet does not separate by task.



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A: The Fee Sheet has been updated and will be posted to the ABAG website by August 3, 2016.

23. Q: Will bids be evaluated differently if bidding on more than one task? In other words, does BayREN have a preference to award one implementer for all tasks?

A: While it would be more efficient from an administrative standpoint to have one implementer for all tasks, no preference will be given to bidders that bid on all tasks.

24. Q: What are the current budgets by task for 2016 and what is being proposed in any advice filings or business plans for 2017?

A: We cannot predict what our approved budget will be for 2017. However, this was our approved 2016 Single Family program budget which includes Tasks One – Three (except for EMV). Note that this budget includes the BayREN members’ administration, implementation and marketing budgets

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