Request for Proposals (RFP) LR1801

Title: Demand Side Management Cost-Effectiveness Tool and Reporting Platform

RFP Issue Date:	**Monday, April 11, 2018**
RFP Submittal Deadline:	**Wednesday, May 2, 2018** 5:00 p.m. PDT
Solicitation Administrator:	**Teresa Rexrode**
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1. INTRODUCTION

The Northern California Power Agency ("NCPA") is a joint powers agency, a public entity established under California Government Code sections 6500 *et seq*. Its members are: the Cities of Alameda, Biggs, Gridley, Healdsburg, Lodi, Lompoc, Palo Alto, Redding, Roseville, Santa Clara, Shasta Lake, and Ukiah, the San Francisco Bay Area Rapid Transit Agency, the Plumas-Sierra Rural Electric Cooperative; the Port of Oakland, and the Truckee Donner Public Utility District.

The Southern California Public Power Authority ("SCPPA") is a joint powers agency, a public entity established under California Government Code sections 6500 *et seq*. Its members are: the Cities of Anaheim, Azusa, Banning, Burbank, Cerritos, Colton, Glendale, Los Angeles, Pasadena, Riverside, and Vernon, and the Imperial Irrigation District.

The California Municipal Utilities Association ("CMUA") is the state trade association representing municipal and publicly owned electric utilities and public water agencies. Its electric utilities members, who are not members of either NCPA or SCPPA, include: the Cities of Corona, Moreno Valley, Needles, Rancho Cucamonga, Pittsburg, San Francisco, and Victorville, Lassen Municipal Utility District, Merced Irrigation District, Modesto Irrigation District, Trinity Public Utility District, and Turlock Irrigation District.

NCPA, SCPPA, and CMUA are referred to hereinafter collectively as "Requestors".

2. SCOPE OF SERVICES

Requestors are accepting proposals from qualified firms to develop:

(1) Demand-Side Management ("DSM") Cost-Effectiveness Tool ("CET")—a database product that Requestors' members can use to evaluate the energy savings and cost-effectiveness of energy efficiency, energy conservation, demand response, load management, and fuel substitution/building electrification measures, programs, and portfolios.

(2) DSM Reporting Platform ("RP")—a database product to summarize individual utility output from the CET. The RP will be used to report program data to regulatory bodies, including but not limited to the California Energy Commission ("CEC") and U.S. Energy Information Administration ("EIA").

Requestors will consider proposals for an integrated CET and RP package from a single respondent, or a joint proposal from separate entities for development of the CET and RP on different, but compatible platforms. Requestors will not consider proposals to develop only the CET or RP as both are essential to this solicitation.

Requestors' members are required by § 9505 of the California Public Utilities Code to report annually to the CEC on their energy efficiency and demand reduction programs, including descriptions of each program, program expenditures, the cost-effectiveness of each program, and energy savings and demand reduction results. Requestors' members currently rely on an Excel-based EE Reporting Tool to summarize program energy savings and cost-effectiveness data. A copy of this EE Reporting Tool is included as Attachment B. Individual utility results are then compiled into statewide summary tables using a second Excel-based product, EE Summary Tool, which is included as Attachment C. In addition, Requestors' members are required to submit program data on their energy efficiency and other DSM programs to the CEC as part of the Integrated Energy Policy Report Electricity Demand Forecast and to the EIA as part of the Annual Electric Power Industry Report (EIA-861 survey). Currently, these multiple reports on the same program data are compiled separately.

Requestors are issuing this RFP to streamline DSM program reporting and in response to passage of Senate Bill 350 (Chapter 547, Statutes of 2015), California's Clean Energy and Pollution Reduction Act of 2015, which directs the CEC to establish energy efficiency targets that achieve a statewide, cumulative doubling of energy efficiency savings in electricity and natural gas final end uses by 2030. A component of the CEC's statewide targets is attributed to the Requestors' member electric utilities and the updated CET should align with the CEC methodology in *Senate Bill 350: Doubling Energy Efficiency Savings by 2030*.[1] Requestors will consider desktop and/or web-based application proposals using an open source stack that may be maintained by Requestors' members if desired. Bidders will also be required to document and provide detailed system architecture descriptions to the satisfaction of Requestors' members.

Requestors' members run the gamut from very small cities, such as Banning and Biggs, to the some of the state's largest utilities in the case of Los Angeles Department of Water and Power and Sacramento Municipal Utility District. Many of the smaller members will not have the staff resources to navigate a complicated database platform. On the other hand, other utilities will have both the resources and the interest to master a more sophisticated solution. The ideal CET and RP will include intuitive, default settings while allowing for more advanced customization of key inputs, such as avoided costs, end use load shapes, and avoided greenhouse gas emissions.

Users of the CET and RP will be staff from Requestors' members. For web-based solutions, users should only have access to their utility's data. Three system administrators—one from each of the Requestors —should have full access and editing rights to all user and utility data.

Prior to the execution of a contract with the successful bidder, Requestors will convene a specification development and workplan session to identify key technical parameters and to establish a timeline of project milestones and deliverables.

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[1] Available at http://www.energy.ca.gov/sb350/doubling_efficiency_savings/.

2.1 CET Requirements

The CET should include the following features:

- ***Utility Information***: User-entered utility identifiers, including utility name, climate zone, contact name, and contact phone number.
- ***Administrative Cost Worksheet:*** User-entered administrative costs by program and portfolio. The CET should include separate line items for (1) Overhead, (2) Marketing & Outreach, and (3) Evaluation, Measurement, and Verification.
- ***Avoided Costs***: Library of avoided costs, in dollars per kilowatt-hour ($/kWh), expressed on an hourly (8760) and seasonal basis (i.e., Summer On-Peak, Winter Off-Peak) and dollars per kilowatt ($/kW), as may be appropriate and used by some or all members. The CET should be preloaded with default avoided cost values. Respondents may reference the most recent Energy and Environmental Economics (E3) Avoided Cost Model as the source for default proxies for POUs, which is available at: https://www.ethree.com/tools/acm-avoided-cost-model/. Users should be able to enter/upload their own avoided cost data, as each user may deem appropriate.
- ***End Use Load Shapes (aka Measure Impact Shapes)***: Library of end use load shapes, including climate zone-specific load shapes for applicable measures (i.e., HVAC). The CEC has contracted for the development of "Energy Efficiency Load Impact Profiles" as a task under the California Investor-Owned Utilities Electric Load Profiles project with ADM Associates, Inc. If available, the CET should be preloaded with these load impact profiles. Users should be able to enter/upload their own load shapes, as each user may deem appropriate.
- ***Standardized Measure Data***: Library of available "unit energy savings" (UES) measures. Measures should include the baseline calculation options identified in Appendix G of *California Publicly Owned Utilities Energy Efficiency Reporting Guidelines – 2017*, available at: http://cmua.org/ca-pou-energy-efficiency-reporting-guidelines/. The CET should be preloaded with UES data from the *Savings Estimation Technical* Reference *Manual – 2017* (TRM), which is included as Attachment C. Users should be able to enter, in dollars, Incentives for their selected measures. Users should also be able to enter/upload their own measures. The California Technical Forum is developing a web-based, electronic technical reference manual, or eTRM, which users may elect to use once it is completed instead of the TRM. API capability is not a requirement, but a preference, and respondents are encouraged to submit proposals that allow for both manual uploads measure updates and automated measure updates from the eTRM to the CET via API.
- ***Utility/Program Specific Measure Data***: Users should be able to enter all parameters that define their specific programs including but not limited to measure quantity installed, rebates and incentives, net-to-gross, measure cost, and have the ability to fully characterize custom measures and programs not included in the standardized measures.

- ***Annual Results:*** Calculation of the following annual metrics by measure, end-use, program, customer class/market sector, and portfolio:
    - Energy savings in gross and net kWh
    - Demand reduction in gross and net kW
    - Administrative Costs
    - Incentive Costs
    - Cost-Effectiveness Tests (see below)
    - Avoided Greenhouse Gas Emissions (see below)
- ***Lifecycle Results***: Calculation of the following lifecycle metrics by measure, end-use, program, customer class/market sector, and portfolio:
    - Energy savings in gross and net kWh
    - Demand reduction in gross and net kW
    - Cost-Effectiveness Tests (see below)
    - Avoided Greenhouse Gas Emissions (see below)
- ***Cost-Effectiveness Tests Results:*** Calculation of Total Resource Cost Test, Program Administrator Cost Test, and Levelized Utility Cost results by measure, program, and portfolio:
    - Total Resource Cost (TRC) Test: Measures the cost and benefits of an efficiency measure as a resource option based on the total cost of the measure to the utility's service territory, including both participant and utility costs. Costs include the cost incurred by the participant to purchase, install and maintain the more efficient equipment and by the utility to market and administer the efficiency program. Any direct installation costs incurred by the utility are also included. Incentives and rebates are not included as they are not a resource cost; instead, they are transfers from the utility to the customer. That is, a rebate increases the utility's cost and decreases the participant's cost by the same amount, with a net effect of zero.
    - Program Administrator Cost (PAC) Test: Measures the effect of the measure on the administrating utility's revenue requirement. The utility's costs of implementing energy efficiency measures include direct installation costs incurred by the utility (as opposed to the participant), incentives and rebates, administration, overhead and marketing expenses. Benefits are the utility's avoided cost of purchasing or generating energy. This test does not consider the effect on utility revenues and the rates charged to its retail customers.
    - Levelized Utility Cost Measures the utility's costs of implementing an energy efficiency measure compared to the present value of the measure energy savings over the life of the measure.
- ***Avoided Greenhouse Gas (GHG) Emissions Results:*** Calculation of avoided GHG emissions, in metric tons of carbon dioxide equivalent (MT CO_2e), by measure, program, and portfolio, on an annual, cumulative, and lifecycle basis. To the extent possible, calculation should be based on existing and accepted values of GHG emissions for California electric generation, expressed in (MT CO_2e/kWh), on an

hourly and/or seasonal basis consistent with of Avoided Costs Users should be able to enter/upload their own avoided GHG emissions data.

- ***Cumulative Results***: Calculation of cumulative incremental savings based on measure life from current reporting year by measure, end-use, program, customer class/market sector, and portfolio for the following metrics:
    - Energy savings in gross and net kWh
    - Demand reduction in gross and net kW

Requestors intend to track cumulative energy savings from 2015 through 2029, to facilitate a comparison of reported energy savings,[2] adopted Requestors' members' 10-year energy efficiency potential studies, and the CEC's POU Cumulative Electricity Savings Targets With Adjustments.[3] The CET should allow for upload of Requestors' members Excel-based tool results from previous years, in comma-delimited .csv format, and calculate the total cumulative savings from all years on record.

2.2 RP Requirements

The RP should include the following features:

- ***Individual CET Results:*** Import of individual Requestors' member annual CET results by measure, end-use, customer class/market sector, utility, and portfolio for:
    - Annual Results
    - Lifecycle Results
    - Cost-effectiveness Tests
    - Avoided GHG Emissions
- ***Summary CET Results***: Compilation of Requestors' members' annual individual CET data into summary results by measure, end-use, customer class/market sector, utility, and portfolio for:
    - Annual Results
    - Lifecycle Results
    - Cost-effectiveness Tests
    - Avoided GHG Emissions
    - Cumulative Savings
- ***Regulatory Forms:*** Population of the annual CET results into the following regulatory Excel forms:
    - CEC—Demand Form 3.2 Efficiency — Cumulative Incremental Impacts[4]
    - CEC—1311, Schedule 1 Energy Efficiency Programs Annual Report[5]
    - EIA—861, Schedule 6, Part A, Energy Efficiency Programs[6]

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[2] See Appendix B of *Energy Efficiency in California's Public Power Sector—11th Edition,* Available: http://www.ncpa.com/policy/reports/energy-efficiency/

[3] See Table A-11 of *Senate Bill 350: Doubling Energy Efficiency Savings by 2030*, Available: http://www.energy.ca.gov/sb350/doubling_efficiency_savings/

[4] http://docketpublic.energy.ca.gov/PublicDocuments/17-IEPR-03/TN213962_20161011T124203_DRAFT_2017_Forms_and_Instructions_for_Submitting_Demand_Forecas.xlsx.

[5] http://www.energy.ca.gov/forms/cec-1311.html.

- EIA—861, Schedule 6, Part A, Weighted Average Life
- EIA—861, Schedule 6, Part B, Demand Response Programs

2.3 User Manual, Training, and Technical Support

Essential to the project is transparency regarding the CET and RP functions and data inputs. Staff at Requestors' members will require instruction on how to use the CET and RP. In addition, Requestors will likely need support in assisting members administer and utilize the CET and RP.

Proposals should include pricing and time allowances for the development of a user manual that includes definitions of terms used in the model and guides for entering user-defined data.

Proposals should also include pricing and time allowances for two (2) trainings for Requestors' members on how to use both the default and user-defined settings. One training will be held at NCPA's headquarters in Roseville, CA and one training will be held at SCPPA's headquarters in Glendora, CA. Trainings should be webcast and recorded for future reference.

2.4 OPTIONAL Public Website

Requestors invite proposals that include a web-based platform through which Requestors' members' reported program data can be made publicly accessible. The California Energy Efficiency Statistics website (http://eestats.cpuc.ca.gov/Views/EEDataLandingPage.aspx), including the Data Viewer and Data Sets library, is an example of the website architecture and features that Requestors are seeking for their members.

3. INSTRUCTIONS TO RESPONDENT

Those Respondents who submit responses agree to do so without legal recourse against Requestors, its Commission, managers, agents, contractors or Member agencies for rejection of any response(s) or for failure to execute an agreement for any reason. Requestors shall not be liable to any Respondent or party at law or in equity for any reason whatsoever for any acts or omissions arising out of or in connection with this RFP.

By submitting its response, each Respondent waives any right to challenge any valuation by Requestors of any responses of any Respondent or any determination of Requestors to select or reject any response of any Respondent or take any action contemplated by this RFP, including any right of a Respondent to intervene in any governing body proceeding for the purpose of protesting the selection or rejection of any Respondent, any other decision of

[6] https://www.eia.gov/survey/#eia-861.

Requestors contemplated by this RFP or any resulting agreement related to a selected Respondent.

3.1. Public Nature of Proposal

Responses to this RFP become the exclusive property of Requestors. All proposals received in response to this RFP become a matter of public record and shall be regarded as public records, except as noted herein. If the Respondent so specifies and clearly identifies portions of its response as "PROPRIETARY AND CONFIDENTIAL", Requestors will make reasonable efforts to treat the marked portions as confidential information. Such information may, however, be made available under applicable state or federal law. Requestors also reserve the right to release such information to its agents, contractors, or Member utilities for the purpose of evaluating a response. Such agents, contractors and Member utilities will be required to observe the same care with respect to disclosure as Requestors. Under no circumstances will Requestors, their Commissions or Boards, managers, agents, contractors or Member utilities, be liable for any damages resulting from any disclosure of Respondent's claimed confidential information during or after this RFP process.

Any proposal which contains language purporting to render all or significant portions of the proposal "Confidential," "Trade Secret," or "Proprietary" may be regarded as non-responsive.

Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, Requestors may not accept or approve that the information that a Respondent submits is a trade secret. If a request is made for information marked "Confidential," "Trade Secret," or "Proprietary," Requestors shall provide the Respondent who submitted the information with reasonable notice to allow the Respondent to seek protection from disclosure by a court of competent jurisdiction.

3.2. Rights of the Requestors

This RFP does not commit Requestors or Requestors' Members to enter into a contract.

Evaluation of a response does not constitute a commitment by Requestors to acquire such services from any source. Requestors and Requestors' Members are not obligated in any way to proceed with this RFP or consider or enter into any agreement or undertake any liability to any Respondent in connection with this RFP and any and all responses, whether qualified or not, may be rejected without any liability whatsoever to any Respondent on the part of Requestors or any Requestors' Member. Requestors shall not be responsible for any costs incurred by Respondent to prepare, submit, negotiate, contract, or participate in this RFP process.

3.3. Examination of Proposal Documents

This RFP includes a description of the scope of services, proposal requirements, and instructions for submitting a proposal. The submission of a proposal shall be deemed a representation and certification by the Respondent that the Respondent:

- Has carefully read and fully understand the information provided by Requestors to serve as the basis for submission of the proposal;
- Has the capability to successfully undertake and complete the responsibilities and obligations of the proposal being submitted;
- Represents that all information contained in the proposal is true and correct;
- Did not, in any way, collude, conspire to agree, directly or indirectly, with any person, firm, corporation or other Respondent in regard to the amount, terms or conditions of this proposal; and
- Acknowledges that Requestors has the right to make any inquiry it deems appropriate to substantiate or supplement information supplied by Respondent, and Respondent hereby grants Requestors permission to make these inquiries, and to provide any and all related documentation in a timely manner.

No request for modification of the proposal shall be considered after its submission on grounds that Respondent was not fully informed about any fact or condition.

3.4. Addenda/Clarifications

There will not be a pre-bidder's conference in relation to this RFP. Questions or comments regarding this RFP must be put in writing and received Requestors no later than 1:00 p.m., Thursday, April 19, 2018. Direct all inquiries regarding this RFP by electronic mail to Teresa Rexrode at trexrode@cmua.org, with a copy to Jonathan Changus at jonathan.changus@ncpa.com.

Information provided by anyone other than the above contact may be invalid and proposals which are submitted in accordance with such information may be declared non-responsive. Responses to all inquiries from Requestors will be communicated via email to all recipients of this RFP. Inquiries received after the date and time stated will not be accepted and will be returned to senders without response. No oral representations or interpretations will be made to any proposer as to the meaning of this RFP.

In the event that it becomes necessary to revise any part of this RFP, written addenda will be issued. Any amendment to this RFP is valid only if it is in writing and issued by Requestors. No oral interpretations or answers shall bind Requestors unless confirmed by Requestors in writing. All addenda shall become a part of this RFP and shall be acknowledged on the Respondent's Information Form (Attachment A).

3.5. Submission of Proposals

Responses to this RFP are due to Requestors with the appropriate attachments by electronic mail no later than 5:00 p.m. (PST) on Wednesday, May 2, 2018. All proposals shall be submitted to Requestors to Teresa Rexrode at trexrode@cmua.org.

A hard copy of the response is not required; however, Respondents may also send a hard copy of the response and/or other supporting documents to CMUA no later than 5:00 p.m. (PST) on Wednesday, May 2, 2018 at:

California Municipal Utilities Association
ATTN: Teresa Rexrode
915 L Street, Suite 1460
Sacramento, CA 95814

Requestors, in their sole discretion, may reject any late or incomplete response.

All materials submitted by the Respondent in response to this RFP will become the property of Requestors and may be used by Requestors for the purpose of evaluating qualifications, soliciting proposals, executing any agreements, regulatory hearings, and administering any resulting definitive agreements.

3.6. Withdrawal of Proposals

A Respondent may withdraw its proposal at any time before the expiration of the time for submission of proposals as provided in the RFP by delivering an electronic or a written request for withdrawal signed by, or on behalf of, the Respondent.

4. TENTATIVE TIMELINE

The proposed timeline is as follows:

RFP Issued	April 11, 2018
Deadline for questions, clarifications	April 19, 2018
Proposals Due	May 2, 2018
Finalists notified	May 7, 2018
Finalists interviews	May 14, 2018
Selected Respondent(s) Notified	May 21, 2018
Contract Executed	June 1, 2018

Solicitation timeline is subject to change. Any updates to the timeline will be posted as an addendum.

A preliminary CET and RP should be provided to Requestors for review by October 15, 2018. A final CET and RP, pending Requestors' review and feedback, should be available for Requestors and Requestors' members to use by November 1, 2018, to facilitate the use of the CET and RP to support Requestors' members' compliance with the statutory annual reporting deadline of March 1, 2019.

5. PROPOSAL FORMAT REQUIREMENTS

These instructions outline the guidelines governing the format and content of the proposal and the approach to be used in its development and presentation. The intent of the RFP is to encourage responses that clearly communicate the Respondent's understanding of the Requestors' requirements and its approach to successfully provide the products and/or services on time and within budget. Only that information which is essential to an understanding and evaluation of the proposal should be submitted. Items not specifically and explicitly related to the RFP and proposal, e.g. brochures, marketing material, etc. will not be considered in the evaluation.

Proposals should be limited to 40 pages in length.

All proposals shall address the following items in the order listed below and shall be numbered 1 through 9 in the proposal document.

5.1. Respondent Information Form

Include a completed Respondent Information Form, which is provided as Attachment A to this solicitation.

The Respondent Information Form shall be signed by an official legally authorized to bind the Respondent:

- Proposals submitted on behalf of a Partnership shall be signed in the firm name by a partner or the Attorney-in-Fact. If signed by the Attorney-in-Fact, there shall be attached to the proposal a Power-of-Attorney evidencing authority to sign proposals, dated the same date as the proposal and executed by all partners of the firm.
- Proposals which are submitted on behalf of a Corporation shall have the correct corporate name thereon and the actual signature of the authorized officer of the corporation written (not typed) below the corporate name. The title of the office held by the person signing for the corporation shall appear below the signature of the officer.

- Proposals which are submitted on behalf of a Limited Liability Company ("LLC") shall be signed by the person or persons authorized to bind the LLC under the LLC's articles of organization.
- Proposals which are submitted by an Individual Doing Business under a firm name ("dba") shall be signed in the name of the individual doing business under the proper firm name and style.

5.2. Proposal Summary

Discuss the highlights, key features and distinguishing points of the Proposal. A separate sheet shall include a list of individuals and contacts for this Proposal and how to communicate with them. This section should be limited to three (3) pages including the separate sheet.

5.3. Profile of the Respondent(s)

Include a brief description of the Respondent's firm size, as well as the proposed local organization structure. Include a discussion of the Respondent firm's financial stability, capacity and resources. Include all other firms participating in the Proposal, including similar information about the firms.

Additionally, this section shall include a listing of any lawsuit or litigation and the result of that action resulting from (a) any public project undertaken by the Respondent or by its subcontractors where litigation is still pending or has occurred within the last five (5) years or (b) any type of project where claims or settlements were paid by the Respondent or its insurers within the last five (5) years.

5.4. Qualifications of the Respondent

Include a brief description of the Respondent's and any subcontractor's qualifications and previous experience on similar or related projects. Provide in table format descriptions of pertinent project experience with other public municipalities and private sector that includes a summary of the work performed, the total project cost, the period over which the work was completed, and the name, title, and phone number of client's to be contacted for references. Give a brief statement of the firm's adherence to the schedule and budget for the project. Requestors may, at their discretion, contact any or all of the references provided.

5.5. Approach & Work Plan

Respondents must provide a detailed discussion of their approach to the successful development and implementation of a CET and RP. Include thorough discussions of CET and RP elements Respondent believes are essential. Include a sample work schedule to accomplish all of the required tasks and the timeline. Specific features of the project that should be addressed in the narrative include the following:

- Describe the overall approach to project management including but not limited to requirements gathering, development, acceptance testing, training and other critical project phases or milestones.
- As described above, the CET and RP will be used by a diverse group of Public Utilities that use different program tracking methodology ranging from sophisticated databases to excel spreadsheets. Furthermore, the programs vary significantly in scale and complexity, ranging from deemed rebates to custom projects and programs. Please describe your firm's vision of the CET and RP user experience starting with raw program data in an unknown format. Include a description of any preprocessing or post-processing steps required outside of the CET and RP.
- Currently, Requestors' members utilize a spreadsheet tool (see Attachment B) to calculate cost effectiveness of energy efficiency and demand response programs. Inherent in this tool are various assumptions that are not explicitly defined, but have significant impacts on the results of the analysis. Please describe how specific assumptions will be carried forward into a new CET and RP, or alternatively, describe the process that will be used to define and document an updated calculation methodology. Examples of assumptions that may require consideration during development are as follows:
    - Measure efficiency degradation
    - Determination of first year and lifetime savings and cost for early retirement and replace on burnout measures.
    - Cumulative savings considering measure life, efficiency degradation, dual baseline and other factors.
    - Other relevant factors addressed in the "*California Publicly Owned Utilities Energy Efficiency Reporting Guidelines – 2017*"
- Describe the training plan including an overview of the topics that will be covered and the planned length of training to the nearest ½ day.
- Describe assumptions around utility participation requirements in the development process, identifying any critical input or data that the utilities will be required to provide.

Include a sample work schedule to accomplish all of the required tasks and the timeline. Identify the staff who would be assigned to each task, including sub-consultants and subcontractors.

5.6. Project Staffing

Attach résumés of key personnel who will perform proposed work and who are assigned to this project. The resumes must include a summary of the person's experience (especially that which is specific to this RFP), a chronological, detailed account of their experience, education information, and identification of any certifications. Please also provide an explanation as to why these personnel are best suited to meeting the requirements of this RFP.

5.7. Proposal Exceptions

Respondent should identify any exceptions or requested changes to the Requestors' RFP conditions, and requirements. If there are no exceptions noted, it is assumed the Respondent will accept all conditions and requirements identified. Items not excepted will not be open to later negotiation.

5.8. Cost Sheet and Rates

The cost sheet and rates information is relevant to a determination of whether the cost is fair and reasonable in light of the services to be provided. Provision of this information assists the Requestors in determining the firm's understanding of the project, and provides staff with tools to negotiate the cost.

This section shall include the hourly rates and proposed total hours of availability per month needed to provide the services desired. Include any other cost and price information, plus a not-to-exceed amount, that would be contained in a potential agreement with the Requestors. The hourly rates may be used for pricing the cost of additional services outlined in the Scope of Work.

6. EVALUATION PROCESS

Requestors will, in its sole discretion, evaluate RFP responses to determine which Respondents are likely to provide the greatest overall value to Requestors' Members. Evaluations will be based on evaluation criteria described below, information provided in each RFP, possible oral interviews with the Respondent, mail or email requests, information already known by Requestors, and other publicly available information such as public credit ratings.

Requestors may, at their sole discretion, request that Respondents complete supplemental questionnaires and/or meet for oral interviews at any stage of the RFP process. Respondents failing to provide information, deemed necessary by Requestors to adequately review a response, may be eliminated from further consideration at any stage or time during the RFP process.

All determinations made by Requestors with respect to any Respondent or its response, including the determinations described in this RFP, shall be made by Requestors at their sole discretion and without liability. No de-briefings will be provided as these determinations will be final and are not subject to review.

The selection committee, which consists of representatives from Requestors and Requestors' Members, will evaluate the proposals provided based on the following criteria:

1. Quality and completeness of proposal:
2. Knowledge, experience and skills of Respondent to provide the requested services:
3. Experience of staff to be assigned to the project, based on prior engagements of similar scope and complexity:
4. Competitive rates for the requested services.
5. Respondent's ability to perform the work within the time specified and demonstrated strong project management:
6. Customer references.

The selection committee will make a recommendation to Requestors. The acceptance of the proposal(s) will be evidenced by an electronic or written Notice of Award from Requestors to the successful Respondent.

ATTACHMENT A

RESPONDENT INFORMATION FORM

RESPONDENT

____
Name of Business

____
Contact Name & Title

____
Street Address

__________________________________ ______ __________
City State Zip

________________ ______________________________
Phone Email

Type of Organization: ____ Sole Proprietorship ____ Partnership _____ Corporation

ADDENDA

To assure that all Respondents have received each addendum, check the appropriate box(es) below. Failure to acknowledge receipt of an addendum/addenda may be considered an irregularity in the Proposal:

Addendum number(s) received: ☐ 1; ☐ 2; ☐ 3; ☐ 4; ☐ 5; ☐ 6;

Or, _____ _____No Addendum/Addenda Were Received (check and initial).

SIGNATURE

By signing below, the submission of a proposal shall be deemed a representation and certification by the Respondent that they have investigated all aspects of the RFP, that they are aware of the applicable facts pertaining to the RFP process, its procedures and requirements, they have read and understand the RFP, and agree that their proposal will remain firm for a period of up to 90 days in order to allow Requestors adequate time to evaluate the qualifications submitted. The information contained in this proposal is true and correct to the best of the signatory's knowledge and is signed under penalty of perjury under the laws of the State of California. No request for modification of the proposal shall be considered after its submission on the grounds that the Respondent was not fully informed as to any fact or condition.

ATTACHMENT A

1. If Respondent is **SOLE PROPRIETORSHIP,** sign here

Date:_______________ ____
Proposer's Signature

____
Proposer's typed name and title

2. If Respondent is **PARTNERSHIP**, at least two (2) Partners shall sign here:

____
Partnership Name (type or print)

Date:_______________ ____
Member of the Partnership signature

Date:_______________ ____
Member of the Partnership signature

3. If Respondent is a **CORPORATION,** the duly authorized officer shall sign as follows:

The undersigned certify that he/she is respectively:

____________________________________ and _____________________________
Signature Title

Of the corporation named below; that they are designated to sign the Respondent Cost Form by resolution (attach a certified copy, with corporate seal, if applicable, notarized as to its authenticity or Secretary's certificate of authorization) for and on behalf of the below named CORPORATION, and that they are authorized to execute same for and on behalf of said CORPORATION.

____
Corporation Name (type or print)

By:____ Date: __________________

Title:____

ATTACHMENTS B – D

are available online via the following link:
http://cmua.org/demand-side-management-rfp/