



# 2018 Request for Proposals for Electric Vehicle Program Administration

*Peninsula Clean Energy is San Mateo County's locally-controlled electricity provider. We are reducing greenhouse gas emissions and offering customer choice at competitive rates.*

**Offers due Thursday, August 30<sup>th</sup> at 5:00 pm Pacific Time**

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## 2 RFP Overview

Peninsula Clean Energy (PCE) is developing a program to incentivize the adoption of electric vehicles. With this request for proposals (RFP), PCE requests information about your company's experience and qualifications you may have relating to the administration of the electric vehicle promotion and incentive programs as described in this RFP scope of work.

This RFP

- Provides general background on PCE
- Describes the service sought by PCE (scope of work)
- Provides an opportunity for respondents to describe their qualifications and assets, and to explain how they could contribute to the program

By participating in PCE's RFP process, a Participant acknowledges that it has read, understands, and agrees to the terms and conditions set forth in these RFP Instructions. PCE reserves the right to reject any offer that does not comply with the requirements identified herein. Furthermore, PCE may, in its sole discretion and without notice, modify, suspend, or terminate the RFP without liability to any organization or individual. The RFP does not constitute an offer to buy or create an obligation for PCE to enter into an agreement with any party, and PCE shall not be bound by the terms of any offer until PCE has entered into a fully executed agreement.

## 3 Peninsula Clean Energy Overview

Peninsula Clean Energy (PCE), a community choice energy (CCE) program, is San Mateo County's official electricity provider. PCE is a joint powers agency, formed in February 2016, consisting of the County of San Mateo and all twenty of its cities. PCE provides cleaner and greener electricity, at lower rates than the incumbent investor-owned utility (IOU), Pacific Gas & Electric Company (PG&E). PCE plans for and secures commitments from a diverse portfolio of energy generating resources to reliably serve the electric energy requirements of its customers over the near-, mid-, and long-term planning horizons. For more information on PCE, please go to [www.peninsulacleanenergy.com](http://www.peninsulacleanenergy.com).

PCE's Strategic Goals:

1. Design a diverse power portfolio that is greenhouse gas free.
  - a. 100% GHG free by 2021
  - b. sourced by 100% CA RPS eligible renewable energy by 2025
  - c. create a minimum of 20 MWs of new local power by 2025
2. Continually strive to offer ECOPlus at rates that are at parity or lower than PG&E rates.

3. Stimulate development of new renewable energy projects and clean-tech innovation in San Mateo County and California through PCE’s procurement activities.
4. Demonstrate quantifiable economic benefits to the County/region and place a priority on local hiring and workforce development practices and environmental justice.
5. Implement programs to further reduce greenhouse gas emissions by investing in programs such as local clean power production, electric vehicles, energy efficiency, and demand response, and partnering effectively with local business, schools, and nonprofit organizations.
6. Maximize and maintain customer participation in PCE.
7. Provide a superior customer experience
8. Build a financially sustainable organization.
9. Foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, and commitment to the organization’s mission and the communities it serves.

## 4 RFP Schedule

<b>Date</b>	<b>Event</b>
Tuesday, August 8, 2018	PCE launches RFP: publishes RFP Instructions.
Thursday, August 16, 2018	Deadline for Participants to submit questions
Monday, August 20, 2018	PCE provides responses to questions on PCE’s website.
Thursday, August 30, 2018, 5:00 pm PT	Deadline for Participants to submit proposals
Friday, September 7, 2018	Anticipated date PCE will notify awardee

### Questions:

- **Question & Answer:** Participants may submit questions concerning the RFP at [programs@peninsulacleanenergy.com](mailto:programs@peninsulacleanenergy.com) by Thursday, August 16th. All questions and answers will be shared with all participants and will be posted on PCE’s website. Responses will be posted by Monday, August 20, 2018.
- **Proposal Review:** PCE may request clarifications by email or phone the week of September 3, 2018. Prompt responses will be requested.

## 5 Proposal Submittal

Proposals must be received on or before the above deadline and submittal must be by email to [programs@peninsulacleanenergy.com](mailto:programs@peninsulacleanenergy.com) with the subject "Proposal - <Organization> <Proposal Title>".

Only electronic submittals will be accepted.

Proposals must include:

1. Organization qualifications
2. Staffing plan
3. Cost proposal
4. Confirmation of acceptance of contract terms or explanation of proposed contract modifications (see Agreement Terms)
5. Sample public report

Notes on the Proposal content:

1. Proposals may include program recommendations.
2. The cost proposal must breakout costs between the two proposed programs (New Vehicle Promotion and Low-Income Incentive).

## 6 Agreement Terms

Awardees will be required to enter into contract using PCE contract terms. Modification of the contract terms may be proposed by the Proposer for consideration by PCE but are not guaranteed to be accepted. Rejection of the final terms from PCE is grounds for disqualification.

PCE contract terms are available for review here:

<https://www.peninsulacleanenergy.com/wp-content/uploads/2018/06/PCE-Contract-Template-Under-100000-CEO-Level.doc>

## 7 PCE Legal Obligations

PCE is not obligated to respond to any offer submitted as part of the RFP. The Parties acknowledge that PCE is a public agency subject to the requirements of the California Public Records Act Cal. Gov. Code section 6250 et seq. PCE acknowledges that the other party may submit information to PCE that the other party considers confidential, proprietary, or trade secret information pursuant the Uniform Trade Secrets Act (Cal. Civ. Code section 3426 et seq.), or otherwise protected from disclosure pursuant to an exemption to the California Public Records Act (Government Code sections 6254 and

6255). The other party acknowledges that PCE may submit to the other party information that PCE considers confidential or proprietary or protected from disclosure pursuant to exemptions to the California Public Records Act (Government Code sections 6254 and 6255). Upon request or demand of any third person or entity not a party to this Contract ("Requestor") for production, inspection and/or copying of information designated by a Disclosing Party as Confidential Information, the Receiving Party as soon as practical but within three (3) business days of receipt of the request, shall notify the Disclosing Party that such request has been made, by telephone call, letter sent via facsimile and/or by US Mail to the address and facsimile number listed on the cover page of the Contract. The Disclosing Party shall be solely responsible for taking whatever legal steps are necessary to protect information deemed by it to be Confidential Information and to prevent release of information to the Requestor by the Receiving Party. If the Disclosing Party takes no such action, after receiving the foregoing notice from the Receiving Party, the Receiving Party shall be permitted to comply with the Requestor's demand and is not required to defend against it.

## **8 Scope of Work**

See following page.

## Scope of Work

### **1 Program Overview**

Peninsula Clean Energy (PCE) is developing multiple electric vehicle promotion and infrastructure programs. The scope for the administrator is focused on the program are as follows:

**New Vehicle Promotion:** Through a competitive process, dealers will be selected as providers for new EV sales promotion based on the best offers below the Manufacturer's Suggested Retail Price (MSRP). The program will include a solicitation to all dealers in San Mateo County to participate, with one dealer per automaker selected. PCE will provide an incentive for participating dealers of \$250 per vehicle and the vehicles must meet minimum qualifications: 20 miles all-electric range for plug-in hybrid (PHEV) and 100 miles for battery-electric vehicle (BEV). The deal period will be in the fourth quarter, October 1, 2018 to December 31, 2018, when dealers are most interested in closing promotions. PCE will provide additional marketing support and aim to co-market with the dealers. The promotion is open to any resident of San Mateo County and certain marketing requirements apply. It is estimated that up to three dealers may be selected and total volume may reach 200 vehicles in the period.

#### **1.1 New Vehicle Promotion Administration**

PCE will provide a dealer incentive to selected Dealers of \$250 per qualifying vehicle sold with the committed promotion to San Mateo County residents during the promotion period.

To receive the dealer incentive, Dealer must verify Participants are San Mateo County residents, place a PCE provided license plate frame on the rear license plate (to be provided) and must submit via email the following documentation to PCE or its third-party contractor for approval:

1. Copy of sales/lease agreement
2. Copy of Dealer vehicle invoice/due bill
3. Copy documentation showing that all promised incentives/credits/cash deals from Dealer were applied to the purchase or lease price (for lease documentation which may not show breakout of incentives, a print out of the "CDK" system or a PCE form to be provided may be used)
4. Copy of proof of Participant residency in San Mateo County such as California Driver's License, Vehicle Registration, or other proof of residency accepted for state IDs<sup>1</sup>
5. Copy of proof of vehicle registration in San Mateo County.
6. Participant signed PCE disclosure, waiver to release contract, survey, and optional photo release (to be provided)
7. Photo of Participant with their vehicle and license plate frame in clear view if photo disclosure is approved. If photo release authorization is not provided by the Participant then the dealer must submit a photo showing the vehicle and license frame without the Participant.

Approved transactions will be aggregated and submitted by the Contractor to PCE for payment to the dealers via ACH transfer twice a month.

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<sup>1</sup> [https://www.dmv.ca.gov/portal/dmv/detail/dl/residency\\_requirement](https://www.dmv.ca.gov/portal/dmv/detail/dl/residency_requirement)

## **2 Contractor Responsibilities For New Vehicle Promotion**

### **2.1 Dealer Training**

Contractor will ensure that participating Dealers' staff are trained to participate in the program. This includes:

- a. Developing presentation material describing the program and the administration requirements. This material will utilize PCE templates and refer to the program as a PCE program. PCE specific content will be included as directed by PCE.
- b. Deliver training(s) through webinars to all appropriate staff as determined by participating Dealers.
- c. Execute the training in advance of the program performance period and provide additional trainings as deemed necessary. Verify that the appropriate training has been completed by the Participating Dealers.
- d. Identify administrative challenges and adjust materials and communications as needed to ensure professional execution of the program.

### **2.2 Incentive Verification and Processing**

Contractor will submit verified qualified transactions to PCE for incentive payments from dealers, as follows:

- a. Contractor will receive documentation (described above item 1.1) from dealerships and ensure eligibility and purchase/lease terms match the requirements of the program. Contractor will communicate with dealerships as needed to resolve issues with purchase/lease documentation or terms.
- b. Contractor will aggregate approved transactions and submit for Dealer payments via PCE's electronic payments system twice per month. PCE will make ACH electronic incentive payments to participating dealerships twice per month, for all rebates processed and approved since the previous payment
- c. Contractor will provide to PCE through mutually-determined electronic means an itemized list (Excel spreadsheet) of the incentives approved and associated verification documentation, organized by dealer and transaction.
- d. Contractor will provide PCE a weekly update on the number and model of EVs purchased or leased; the amount of incentives submitted for payment and outstanding; the amount of remaining incentive payment fund balance; and dealer reimbursement errors and corrections.

Provide input to PCE regarding dealer performance for evaluation purposes.

### **2.3 Final Report**

The Contractor will develop a final report for PCE. The document will be of a professional standard appropriate for elected officials and members of the public. The document will include:

- a. Data about the vehicles and applicants participating in the program during implementation of the PCE New Vehicle Promotion Program.
- b. Phone survey of at least three (3) dealerships to assess their satisfaction with the program and recommendations for improvement.
- c. Assessment of the program including impact of the program on increasing baseline sales that would have occurred without the program.
- d. Recommendations for future program including operational improvements and considerations associated with the changing EV market.

### **2.4 Contractor Confidentiality**

Contractor understands that all materials viewed and accessed pursuant to the projects listed under this RFP, shall remain confidential. The final report and all working drafts shall become and remain the property of PCE.