



2018 Request for Proposals for Building and EV Reach Code Consultant

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, January 3rd at 5:00 pm Pacific Time

1	Contents	
2	RFP Overview	1
3	Peninsula Clean Energy Overview	1
4	RFP Schedule	2
5	Proposal Submittal	3
6	Review and Selection Process	3
7	Agreement Terms	3
8	Inclusion of Non-Participating Agencies	4
9	PCE Legal Obligations	4
10	Scope of Work	4

2 RFP Overview

Peninsula Clean Energy (PCE) programs include advancing the adoption of electric vehicles and transitioning building fossil fuel uses to low-carbon electricity. With this request for proposals (RFP), PCE requests information about the experience and qualifications your company may have relating to the development of model building “reach” codes to address electric vehicle infrastructure and building electrification needs as described in this RFP scope of work.

This RFP is being executed in collaboration with Silicon Valley Clean Energy (SVCE) as a prospective joint project. SVCE’s participation is subject to SVCE Board of Directors’ review and approval¹.

This RFP

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

By participating in PCE’s RFP process, a Proposer 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, and 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.

PCE’s Strategic Goals:

¹ SVCE staff anticipates taking the request to their Board at the meeting on December 12, 2018.

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

<i>Date</i>	<i>Event</i>
Monday, November 26, 2018	PCE launches RFP: publishes RFP Instructions.
Friday, December 7, 2018	Deadline for Proposers to submit questions (see below)
Friday, December 14, 2018	PCE provides responses to questions on PCE’s website.
Thursday, January 3, 2019, 5:00 pm PT	Deadline for Proposers to submit proposals
Thursday, January 10, 2019 and Friday, January 11, 2019	Possible in-person interviews of top proposers
Wednesday, January 16, 2019, 5:00 pm PT	Anticipated date PCE will notify awardee
Thursday, January 24, 2019	Anticipated date for Board execution of contract

Questions:

- **Question & Answer:** Proposers may submit questions concerning the RFP at programs@peninsulacleanenergy.com. All questions and answers will be shared with all Proposers and will be posted on PCE’s website.

- **Proposal Review:** PCE may request clarifications by email or phone January 3, 2019, through January 7, 2019. Prompt responses will be requested.
- **Proposer Interviews:** PCE may conduct in-person interviews of the top proposers on January 10 and January 11, 2019.

5 Proposal Submittal

Proposals must be received on or before the above deadline and submittal must be by email to programs@peninsulacleanenergy.com with the subject "Proposal - <Organization> - Reach Codes Consultant".

Only electronic submittals will be accepted.

Proposals must include:

1. Organization qualifications (4 pg. max)
2. Considerations and approach for development of model codes (4 pg. max)
3. Stakeholder engagement process (3 pg. max)
4. Schedule (table or chart, 1 pg. max)
5. Cost proposal (2 pg. max, include rate schedule)
6. Confirmation of acceptance of contract terms or explanation of proposed contract modifications (see Agreement Terms)
7. Project staff credentials (no limit)

6 Review and Selection Process

PCE staff will evaluate the proposals provided based on the following criteria:

1. Completeness of Proposal
2. Qualifications of the firm and staff
3. Proposed approach to implement project
4. Past experience
5. Cost structure
6. Exceptions to PCE's contract template

7 Agreement Terms

Awardees will be required to enter into a contract using PCE's standard 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's standard contract terms are available for review here:

<https://tinyurl.com/pcecontractemplate>

8 Inclusion of Non-Participating Agencies

PCE is asking all responding vendors to indicate their willingness to extend the terms of resulting contracts, inclusive of price, to other interested California-based municipalities, municipally-owned utilities and community choice energy programs. While this clause in no way commits these agencies to contract with PCE's awarded consultant, nor does it guarantee any additional orders will result, it does allow other agencies, at their discretion, to make use of PCE's competitive process (provided said process satisfies their own procurement guidelines) and purchase directly from the awarded contractor. All purchases made by other agencies shall be understood to be transactions between that agency and the awarded vendor; PCE shall not be responsible for any such purchases.

9 PCE Legal Obligations

PCE is not obligated to respond to any offer submitted as part of the RFP. All 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 another 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) ("Confidential Information"). Any such other party acknowledges that PCE may submit to the other party Confidential Information. Upon request or demand of any third person or entity not a party to this RFP ("Requestor") for production, inspection and/or copying of information designated as Confidential Information by a party disclosing such information ("Disclosing Party"), the party receiving such information ("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 email and/or by US Mail to the address or email address listed on the cover page of the RFP. 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.

10 Scope of Work

See following page.

Scope of Work

1 Program Overview

Peninsula Clean Energy's and Silicon Valley Clean Energy's (SVCE) missions are to reduce greenhouse gas (GHG) emissions in San Mateo County and Santa Clara County (in the cities that SVCE covers), respectively. Emissions from transportation and building natural gas use comprise the largest sources of GHGs within the territories. This program aims to develop and advance Building Electrification and Electric Vehicle (EV) Infrastructure "reach" codes with member municipalities to update local building codes for new residential and commercial construction and major remodels. These codes are to be developed in alignment with and build on the 2019 California statewide building code updates. Codes for new buildings and major modifications are the most cost-effective points at which to install Electric Vehicle charging infrastructure and electric appliances (such as heat pump water heaters) compared to retrofitting existing buildings.

2 Consultant Responsibilities

2.1 Research Existing State and Local Codes

Consultant will research relevant state and local building codes to be developed related to building electrification and EV infrastructure. These codes may serve as models or foundations for the local model reach codes. This research must include both mandate- and incentive-based codes. The key features will be summarized in format easy to review for stakeholders.

2.2 Lead Development of Model Reach Codes

Consultant will work with PCE, the San Mateo County Office of Sustainability (OOS), and SVCE to provide key education to, and take input from, municipalities and other identified stakeholders to draft model reach codes to achieve program objectives. OOS and SVCE will provide facilitation support for their respective territories. The model reach code options must extend and be compliant with California's 2019 Building Code and are expected to leverage the cost-effectiveness analysis results from the 2019 Statewide Codes & Standards Program, as needed.

Stakeholders to include in the reach code development process will be jointly determined but are anticipated to include elected officials, municipal staff, developers, electric vehicle experts, building electrification experts, Pacific Gas & Electric, building trades, and other members of the community. The facilitated processes for EV infrastructure and for building electrification may be handled separately as deemed appropriate.

The process will include a minimum of one revision and one charette per reach code focus area (i.e. EV and building electrification) and per service territory (PCE and SVCE). It is also anticipated that the final product may include two to four versions of each model reach code with varying levels of stringency. For example, this may include prescriptive or performance-based options for building electrification. The process and schedule will be refined in consultation with the Consultant.

2.3 Identify Tools and Processes for Adoption and Implementation

This task includes identifying tools and process improvements to consider for 2.5 and 2.6. This may include but is not limited to:

- a. Adoption tools: This includes template staff reports, findings for local governments to use when submitting Building codes to the California Building Standards Commission for acceptance, and/or other tools needed to move forward with the code adoption process at the local government and State level.
- b. Implementation tools: This includes building department training, permit and inspection processes streamlining (including documenting all process efficiencies and benefits enabled by a suite of proposed streamlined permitting processes), educating builder community, and/or other tools needed to move forward with the code implementation process.

Any recommendations and deliverables will be developed with and vetted by the interested municipalities, development community, and other key stakeholders.

2.4 Develop EV Cost-Benefit Analysis

For the EV model codes, Consultant will also carry out an analysis including all costs and benefits – monetary and non-monetary (e.g. emissions impacts) – of the measures included. This will include the incremental construction costs resulting from the reach code (“first costs”). The EV cost-benefit analysis will be developed in a manner consistent with State and industry standards.

Municipalities will be encouraged to utilize the Statewide Codes & Standards program cost-benefit analysis for evaluating the efficacy of the Building Electrification model codes. The Consultant may be requested to provide additional enhanced analysis to supplement the Statewide cost-benefit analysis. If so, this will be treated as technical assistance under item 2.5.

2.5 Provide Technical Assistance to Municipalities for Adoption

For each territory (PCE and SVCE), the Consultant will provide technical assistance to interested municipalities for the adoption process, including developing the tools mutually agreed to in 2.3, and which may include presentations or answering technical questions at Commissions and Councils. PCE and SVCE have a total of thirty-four jurisdictions (21 and 13, respectively). The Consultant should assume that all municipalities will participate, however, only a subset of municipalities may participate in the reach code development and adoption process.

2.6 Provide Technical Assistance to Municipalities for Code Implementation

For each territory (PCE and SVCE), the Consultant will provide technical assistance to municipalities for the implementation process, including developing the tools mutually agreed to in 2.3, and which may include staff training sessions as requested.

3 Timing

All work must be completed with sufficient time for municipalities to execute ordinances in 2019 that will go into effect on January 1st, 2020.

4 Budgeting

The budget should include fixed costs for tasks 2.1 through 2.4. Tasks 2.5 and 2.6 should be provided as a variable cost (e.g. on a costs per-municipality basis).