



2019 Request for Proposals For Strategic Plan Development

Peninsula Clean Energy is the locally-controlled electricity provider serving the businesses and residents of San Mateo County. We are reducing greenhouse gas emissions and offering customer choice at competitive rates.

Offers due August 20, 2019, at 5:00 pm Pacific Time

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Attachments

- Supplier Diversity Questionnaire (Optional) – completed by vendor

Peninsula Clean Energy (PCE), a California Joint Powers Authority, is seeking proposals from interested vendors to respond to this RFP.

1 RFP Overview

Peninsula Clean Energy (PCE) seeks a partner to help us formulate a new dynamic and visionary strategic plan for PCE that considers its mission and vision and addresses its goals and programs that define its operations. With this request for proposals (RFP), PCE requests proposals to develop a five-year strategic plan, the details of which are found in Section 11.

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 explain how they could contribute to the program

2 About Peninsula Clean Energy (PCE)

Peninsula Clean Energy (PCE), a community choice energy (CCE) aggregator, is San Mateo County's official electricity provider. Formed in February 2016, PCE is a joint powers authority, consisting of the County of San Mateo and all twenty of its towns and cities. PCE seeks to obtain 100% of the electricity that it sells from carbon-free sources in order to minimize greenhouse gas (GHG) emissions, thereby providing 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. PCE's programs are focused on its mission to reduce GHG emissions in San Mateo County and include advancing the adoption of electric vehicles and transitioning building energy uses to low-carbon electricity. PCE currently has 21 staff members on board who work out of our office in Redwood City. PCE has a 22-member board of directors that consists of one elected councilmember from each of the 20 cities and towns in San Mateo County, and two county supervisors. As a public agency, the board holds a public meeting on the fourth Thursday of each month. For more information on PCE, please go to www.peninsulacleanenergy.com.

As part of its mission-driven, collaborative, not-for-profit, locally-focused roots, PCE is committed to the following set of strategic goals:

1. Design a diverse power portfolio that is greenhouse gas free.
 - 100% GHG free by 2021
 - sourced from 100% CA RPS eligible renewable energy by 2025 on a time coincident basis, provided it is economically viable
 - create a minimum of 20 MWs of new local power by 2025

2. Continually strive to offer ECOPlus at rates that are lower than PG&E rates provided it is economically viable.
3. Stimulate development of new renewable energy generation and storage projects in San Mateo County and California through PCE's procurement activities.
4. Demonstrate quantifiable economic and environmental justice benefits to the County/region including by placing a priority on local hiring and inclusionary workforce development practices with a goal of increasing diversity.
5. Implement programs to further reduce GHG emissions and support the county's community-wide efforts to be completely GHG-free by 2045 by investing in electric transportation, energy efficiency and demand response, and partnering effectively with municipalities, business, schools, and nonprofit/faith organizations.
6. Maximize and maintain customer participation in PCE.
 - Provide a superior customer experience
 - Develop PCE brand awareness and loyalty throughout the County.
 - Actively encourage voluntary participation in its ECO100 renewable energy product
 - Actively encourage participation in other programs PCE develops
 - Achieve recognition as an EPA Green Power Community for all cities and towns in San Mateo County and EPA Green Power Partnership for all cities with municipal accounts enrolled in ECO100 by 2018 ¹
7. Build a financially sustainable organization.
 - Build sufficient reserves in a rate stabilization fund
 - Achieve an investment grade credit rating by 2021 ²
8. 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.
9. Leverage Peninsula Clean Energy/Silicon Valley expertise and relationships to support innovation across all of PCE's programs and activities.
10. Assist in setting up CCAs in other areas of the state, including where PCE has utility scale generation.

¹ This goal was achieved in 2018.

² This goal was achieved in May 2019.

3 RFP Schedule

<i>Date</i>	<i>Event</i>
July 29, 2019	PCE launches RFP
August 5, 2019	Deadline for Proposers to submit questions (see below)
August 9, 2019	PCE provides responses to questions on PCE's website.
August 20, 2019	Deadline for Proposers to submit proposals
Week of August 26, 2019	Possible phone or in-person interviews of top proposers
September 3, 2019	Anticipated date PCE will notify awardee
September 9, 2019	Project Start

Questions:

- **Question & Answer:** Proposers may submit questions concerning the RFP at strategy@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 from August 20 through August 23. Prompt responses will be requested.

4 Proposal Submittal

Proposals must be received on or before the above deadline and submittal must be by email to strategy@peninsulacleanenergy.com with the subject "Proposal - <Vendor Name> - 2019 Strategic Plan Development".

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.

Only electronic submittals will be accepted.

5 Content of Response

Interested vendors must submit the following documents (except those marked “Optional”) to be considered for awarding of this proposal:

1. Cover Letter with the following elements (1 page):
 - Reference to this RFP
 - Legal business name, address, telephone number, and business status (corporation, limited partnership, individual, etc.).
 - Name of vendor’s representative with respect to this RFP along with telephone number and email address.
 - A signature of an authorized individual.

2. Approach (4 pg. max.):
 - Goals and measurable objectives.
 - Management approach.
 - Proposed scope of work.
 - Key challenges and resolutions.
 - Timeline.

3. Qualifications and Experience (4 pg. max.): Submit the following information -
 - A brief summary of vendor’s history and background.
 - A summary of similar projects completed or worked on within the last 2 years for similar types of organizations nationwide, in California and/or within San Mateo County
 - Identification of relevant licenses and certifications.

4. References:
 - Contact information for three (3) references from work performed in the last three years. Please include scope of work, dates of contract, contract amount, contact person, telephone number, and email address

5. Certificates of Insurance for the following coverages:
 - Commercial General Liability – for bodily injury, property damage, and personal injury \$1,000,000 – each occurrence \$2,000,000 – in aggregate
 - Business Automobile Liability – “any auto” (Company Vehicles) – At least \$1,000,000
 - Personal Automobile Liability – “any auto” (Personal Vehicles) – At least \$500,000
 - Worker’s Compensation and Employer’s Liability (EPL)– injury or death, each accident At least \$1,000,000 (EPL not required for Sole Proprietor)

6. Supplier Diversity Questionnaire (Optional): PCE’s Supplier Diversity Questionnaire is attached to this RFP. Please note, your response (or lack

thereof) will have no impact on your contract status or eligibility to work with PCE in accordance with state law.

7. Proposed Schedule (table or chart, 1 pg. max)
8. Cost Proposal (2 pg. max, include rate schedule, if applicable)
9. Confirmation of acceptance of contract terms or explanation of proposed contract modifications (see Agreement Terms)

6 Review and Selection Process

PCE's ad hoc board committee and PCE's CEO will evaluate the proposals provided based on the following criteria:

1. Completeness of Proposal/Content of Response
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 Supplier Diversity

Consistent with its strategic goals, PCE has a strong commitment to 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. As part of that goal, PCE strives to ensure its use of vendors and suppliers who share its commitment to sustainable business and inclusionary practices.

To help ensure an inclusive set of vendors and suppliers, PCE's policy requires it to:

1. Strive to use local businesses and provide fair compensation in the purchase of services and supplies;
2. Proactively seek services from local businesses and from businesses that have been Green Business certified and/or are taking steps to protect the environment; and
3. Engage in efforts to reach diverse communities to ensure an inclusive pool of potential suppliers.

General Order 156 (GO 156) is a California Public Utilities Commission ruling that requires utility entities to procure at least 21.5% of their contracts with majority women-owned, minority-owned, disabled veteran-owned and LGBT-owned business enterprises' (WMDVLGBTBEs) in all categories. Qualified businesses become GO 156 Certified through the CPUC and are then added to the GO 156 Clearinghouse database. The CPUC Clearinghouse can be found here: www.thesupplierclearinghouse.com.

While PCE is not legally-required to comply with GO 156, PCE's policies and commitment to diversity are consistent with the principles of GO 156, and, therefore, respondents to this RFP are asked to voluntarily disclose their GO 156 certification status as well as their efforts to work with diverse business enterprises, including those owned or operated by women (WBE), minorities (MBE), disabled veterans (DVBE), and lesbian, gay, bisexual, or transgender people (LGBTBE).

As a public agency and consistent with state law, PCE will not use any such provided information in any part of its decision-making or selection process. Rather, PCE will use that information solely to help evaluate how well it is conforming to its own policies and goals.

Pursuant to California Proposition 209, PCE does not give preferential treatment based on race, sex, color, ethnicity, or national origin.

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 General Terms and Conditions

1. PCE's Reserved Rights: PCE may, at its sole discretion: withdraw this Request for Proposal at any time, and/or reject any or all materials submitted. Respondents are solely responsible for any costs or expenses incurred in connection with the preparation and submittal of the materials for this RFP.
2. Public Records: All documents submitted in response to this RFP will become the property of PCE upon submittal and will be subject to the provisions of the California Public Records Act and any other applicable disclosure laws.
3. No Guarantee of Contract: PCE makes no guarantee that a contractor and/ or firm added to the qualified vendor list will result in a contract.
4. Response is Genuine: By submitting a response pursuant to this RFP, Respondent certifies that this submission is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the submitting firm has not directly or indirectly induced or solicited any other submitting firm to put in a sham bid, or any other person, firm or corporation to refrain from submitting a submission, and the submitting firm has not in any manner sought by collusion to secure for themselves an advantage over any other submitting firm.

11 Detailed Project Description

See following page.

Detailed Project Description – completed by PCE

1. Project Overview: Five-Year Strategic Plan (2020-2025)

Peninsula Clean Energy (PCE) is seeking proposals from a firm or consultant to facilitate a five-year strategic plan. We envision a process that lasts from 6 to 9 months, with the process beginning in August 2019.

PCE, a joint powers agency, was formed in February 2016, and the board of directors has approved PCE's mission statement and goals, which are reviewed and refined annually, (<https://www.peninsulacleanenergy.com/goals-and-policies/>). These goals direct the day-to-day work that PCE staff undertake.

A formal strategic planning process has not previously been conducted by PCE but considering PCE's growth and development over the last three years, it is now appropriate to launch this process. The strategic planning process that PCE now wishes to undertake serves multiple objectives:

- Refresh PCE's mission and vision statements
- Translate the Board's mission and vision into a set of goals
- Develop specific strategies to achieve each goal,
- Provide clear expectations to increase PCE staff's understanding of each person's role in achieving the organization's goals and implement its strategies,
- Provide an overview of PCE's strategy for regulatory, legislative, and other external and internal stakeholders

PCE's Chief Executive Officer will have staff responsibility for facilitating the planning process with the selected consultant. An ad hoc committee of five of the twenty-two members of the PCE Board of Directors will be involved in the process, as well as PCE's senior staff members, and selected outside stakeholders.

We envision an iterative process that involves all of our major stakeholder groups including the Board of Directors, PCE staff, PCE's Citizens Advisory Committee, and external stakeholders. We expect that our interactions with these groups will not only provide strategic direction, but also feedback on the goals and programs that PCE has outlined for the next five years, as well as other ideas outside of what has already been outlined. Therefore, we also are looking to the strategic planning process as a way of framing choices for the future of the organization that, ultimately, helps the board and staff establish priorities.

2. Desired Process

We seek a partner to help us formulate a dynamic and visionary strategic plan for PCE that considers the mission and vision of the organization and addresses the existing strategic goals that the Board has developed and refined over the last 3 years.

We would like for the planning to be done through an iterative process that includes:

- Facilitated discussions with the Board of Directors (Targeting two half day sessions);
- Surveys of stakeholders (Board, Staff, Citizens Advisory Committee, other external stakeholders as defined by PCE);
- A concise regional environmental scan that augments the facilitated discussions above;
- An industry specific assessment (including other CCAs and the general energy/utility industry in California);
- A facilitated discussion to construct, frame and prioritize all the proposed strategic goals and objectives for final adoption;

We are open to additional actions such as focus groups or small group discussions with key audiences or other methodology, but please list as optional pricing.

3. Deliverables

The final deliverable should be a dynamic, but simple plan that can be shared in presentation and hard-copy format. We want a very streamlined and usable planning tool.

The final document should include:

- Presentation of mission and vision of organization, and narrative for telling the organization's story;
- Complete listing of adopted strategic goals, objectives and tactics, segmented by year;
- Performance measures and other measurable milestones for the goals and objectives (preferably by year); and,
- A financial strategy with cost-benefit analysis.

The strategic planning consultant should provide the content for the plan and PCE's design firm will support producing a hard-copy and pdf document for wider distribution.

4. Dates and Timelines

Proposals should be submitted via email to strategy@peninsulacleanenergy.com per the schedule shown above in section 3. The work will commence immediately in August 2019 and continue until complete; the goal is to have a final plan ready for adoption at the Board of Directors Meeting within 6 to 9 months of project start. In addition to other in-person meetings, the consultant should plan to attend the PCE Board retreat scheduled for Saturday, September 28, 2019.

PCE Supplier Diversity Questionnaire (Optional)

Providing information in this questionnaire is optional. As a public agency and consistent with state law, PCE will not use any such provided information in any part of its decision-making or selection process.

Contact information:

Business Name	
Email address	
Phone number	
Where is your business located/headquartered?	

Labor Diversity:

1. Is your business certified under General Order 156 (GO 156)?

- Yes
- No
- Qualified as WMDVLGBTBEs, but not GO 156 Certified

If you answered either "Yes" or "Qualified" above, please choose all categories that apply below.

- Woman-owned
- Minority-owned
- Disabled Veteran-owned
- LGBT-owned

2. Does your business use subcontractors that are certified under GO 156?

- Yes
- No
- Qualified as WMDVLGBTBEs, but not GO 156 Certified

If you answered either "Yes" or "Qualified" above, please choose all categories that apply below.

- Woman-owned
- Minority-owned
- Disabled Veteran-owned
- LGBT-owned

3. Does your business have hiring targets of minority-owned, women-owned, LGBTQ-owned, or disabled veteran-owned subcontractors?

- Yes
- No
- Not applicable

Labor Agreements:

This section of questions focuses on the labor agreements of your business. If your business/contract with PCE does not have a labor component, please answer "not applicable."

1. Does your business have history of using local-hires, union labor, or multi-trade project labor agreements?

- Yes, within PCE’s service area of San Mateo County
- Yes, CA-based labor, but not local to PCE’s service area of San Mateo County
- No
- Not applicable

If you answered “Yes, within PCE’s service area of San Mateo County” above, please provide the percentage of labor agreements with local, union, and multi-trade labor (if available) and describe past efforts.

If you answered “Yes, CA-based labor, but not local to PCE’s service area of San Mateo County” above, from where in California is the labor sourced?

2. In your proposed contract with PCE, does your business plan to use local hires, union labor, or multi-trade project labor agreements?

- Yes
- No
- Not applicable

If you answered "Yes" above, please quantify the number of such labor agreements and explain.

3. Does your business pay workers prevailing wage rates or the equivalent?

Prevailing wage in California is required by state law for all workers employed on public works projects and determined by the California Department of Industrial Relations according to the type of work and location of the project. To see the latest prevailing wage rates, go to www.dir.ca.gov/Public-Works/Prevailing-Wage.html

- Yes
- No
- Not applicable

4. In your proposed contract with PCE, does your business pay and/or plan to pay prevailing wages or the equivalent?

To see the latest prevailing wage rates, go to www.dir.ca.gov/Public-Works/Prevailing-Wage.html

- Yes
- No
- Not applicable

5. Does your business support and/or use apprenticeship programs?

- Yes
- No
- Not applicable

If you answered "Yes" above, please describe the apprenticeship programs your business plans to use.

6. Does your business employ workers and/or use businesses from PCE's service area of San Mateo County?

- Yes
- No

If you answered "Yes" above, please quantify the number of workers/businesses, the businesses used, and in which communities the workers or business reside.

Equity, Diversity, Inclusion, and Environmental Justice:

PCE is committed to equity, diversity, inclusion, and environmental justice both within our organization and within our communities.

1. Does your business have initiatives to promote workplace diversity?

- Yes
- No

If you answered "Yes" above, please describe such initiatives or provide any supporting statistics or documentation for diversity within the business.

2. What other efforts related to equity, diversity, inclusion, or environmental justice does your business pursue?

3. If there is anything else related to supplier diversity that is not captured in your answers above, please describe below:
