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2019 RFP for Strategic Plan Development

Responses to Questions

August 9, 2019

Scope/Project Description:

1. There are a few places in the project description that have the potential to significantly increase the scope and budget associated with PCE's strategic plan. Please provide additional specificity (and examples if appropriate) regarding the type and depth of information you're seeking w/r/t:
 - a. Regional environmental scan

We would look to the consultant's suggestions/expertise as to recommendations. But some initial thoughts are:

- * San Mateo County and PCE's role in helping the county reduce its GHG emissions, such as each of the 20 cities and the county's climate action plans; the county's sea level rise initiative;*
- * Innovation in energy related or other GHG-reducing technology in Silicon Valley (e.g. storage, load shaping, etc.)*
- * Changing county demographics, including low-income populations*
- * Political landscape in the state and PCE's role in accelerating climate goals*

- b. Industry specific assessment

Looking at other CCAs and the energy/utility industry in CA; and possible industry restricting in light of the PG&E bankruptcy (although this won't be settled before this strategic plan is completed)

- c. Financial strategy/cost-benefit analysis

What are the financial impacts of a particular strategy and how do we measure the cost-benefits? PCE's finance team members can assist as well in any financial analysis.

2. Are there examples of Strategic Plans that PCE likes or wishes to emulate? If so, this could be helpful in determining proper scope and budget targets, which

can significantly range depending on level of detail, level of stakeholder engagement, degree of external research required, etc.

One example is the Strategic Plan for Filoli (filoli.org). PCE is a different type of organization and business, and we also want the strategic plan to identify clear paths that PCE staff will take to effectuate the organization's strategy. That might take the form of an internally based deliverable that PCE staff can use as a guide.

Logistics/Approach:

1. What is the level of PCE staff participation in this project? For example, will PCE assist with meeting scheduling/logistics, sharing existing strategy and planning documents, sending out surveys, and/or being part of the core project team? This information will help with time and budget projections.

PCE staff can assist with meeting scheduling/logistics, sharing existing documents, and sending out surveys. One or two PCE staff can be part of the core project team.

2. Does PCE have a preference for a "time and materials" or project-based fee structure?

PCE prefers a project-based fee.

3. Does PCE have a top-end budget cap for this project? The cost variance is significant depending on whether PCE seeks a Cadillac or Kia Plan... or something in the middle. Any guidance would be helpful.

PCE sees this as a six to nine-month project, in the range of \$60-\$90,000.

4. Is PCE amenable to a team approach with more than one vendor working in partnership?

Yes, provided the team has experience working together and the view from PCE is a seamless vendor.

1. Can you provide guidance on the number of stakeholders you would like to survey?

All members of the board (22), all PCE staff (21), citizens advisory committee (15), other key community stakeholders and selected customers

2. Can you clarify what level of detail you are looking for within the financial strategy with cost-benefit analysis that is requested as the final deliverable? Are you looking for qualitative assessment or a quantitative detailed analysis? Should this analysis focus on the high level strategic goals or strategic objectives and tactical initiatives?

The consultant should focus on the high-level strategic goals, with PCE staff providing support for any more detailed strategic objectives and tactical initiatives.

3. Does PCE have a budget cap for this project?

Please see the response above.

- The RFP Schedule lists the project start date as September 9, 2019. However, the RFP also refers to an August start date. Can you please confirm the timeline?

The project start is September 9. The “August” start in Section 4 should instead read “September”.

- To help provide scope for the Cost Proposal section of this RFP, what is the budget range allocated for this bid?

Please see the response above.

- Can you please elaborate on what you mean by “management approach” in the Approach section of the Content of Response portion of the RFP?

Management approach is how the consultant plans to manage the project. For example, when conducting interviews, which will be in-person, which will be by phone, which will be by electronic survey.

- Reference is made to both PCE's and the Board's mission and vision statements. What, if any, difference is there between the two?

They are the same.

- Can you please clarify what is meant by a "concise regional environmental scan" in the Desired Process section of the Detailed Project Description portion of the RFP?

Please see the response above.

- What are known future business changes expected for PCE (i.e. switching to 100% renewable in 2025, upcoming PCE programs, etc.)?

100% GHG-free in 2021, 100% renewable in 2025, other documents that provide some information are:

- *Integrated Resource Plan (<https://www.peninsulacleanenergy.com/wp-content/uploads/2018/01/PCE-FINAL-2017-IRP-Updated.pdf>)*

- *High-level Program Roadmap on slides 16 to 30:
(https://www.peninsulacleanenergy.com/wp-content/uploads/2018/10/2018-09-29-Board-Retreat-Master-Presentation-Slides_jp.pdf)*

- What KPIs, if any, does PCE currently maintain and work against in support of its stated objectives?

PCE reports annually to the board on the achievement of its goals at the September board retreats.

- Are there any examples of the kind of information/details that PCE is looking for in such a strategy and/or cost-benefit analysis?

We are looking to the consultant to suggest the best approach.

- To what extent, and, in what ways, does the 2018 Integrated Resource Plan inform the desired strategic plan and deliverables described in this RFP?

The Integrated Resource Plan provides a lot of detail on the procurement strategy PCE is undertaking for meeting our electricity delivery goals, and there is much helpful information in that document. That document does not cover new activities, including our energy programs, distributed energy resources, local renewable development, workforce development, etc. that are also part of our overall goals.