



Request for Proposals

Distributed Energy Resources Site Evaluation and Engineering Consulting Services

Peninsula Clean Energy Authority, a California Joint Powers Authority, is seeking proposals from qualified vendors to provide site evaluation and engineering consulting services for the development of solar + storage Distributed Energy Resources projects at public facilities in San Mateo County.

Initial Responses are due by or on *August 5, 2020*



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1 RFP OVERVIEW

Peninsula Clean Energy Authority issues this Request for Proposals (RFP) to seek offers from qualified providers of design and engineering services to assist in the evaluation of seven sites in San Mateo County for Distributed Energy Resource (DER) Deployments. These deployments are expected to be solar photovoltaic (solar PV) coupled with a Battery Energy Storage System (BESS). However, other equipment may be considered, such as EV charging stations. The key scope of work will be to independently inform the deployment of DERs but does not include deployment, ownership, or operations of DERs. More broadly, this project seeks to develop learnings and methods to improve the DER site evaluation and development process to enable more efficient future procurements of DERs.

This is a 2-step RFP. Step 1 is an initial qualification process after which Peninsula Clean Energy will invite selected Respondents to proceed to Step 2 and provide a more detailed response.

Peninsula Clean Energy will evaluate the offers received from this RFP and negotiate and execute a contract with the selected Respondent according to the schedule herein. If required, the contract may be taken to Peninsula Clean Energy's Board of Directors for final approval.

This RFP-

- Provides general background on Peninsula Clean Energy
- Describes the service sought by Peninsula Clean Energy (scope of work)
- Provides an opportunity for Respondents to describe their qualifications and experience and explain how they can contribute to services requested.

2 ABOUT PENINSULA CLEAN ENERGY

Peninsula Clean Energy, a community choice energy aggregator, is San Mateo County's official electricity provider. Formed in February 2016, Peninsula Clean Energy is a joint powers authority, consisting of the County of San Mateo and all twenty of its towns and cities. Peninsula Clean Energy provides cleaner and greener electricity, and at lower rates, than the incumbent investor-owned utility (IOU), Pacific Gas & Electric Company (PG&E). Peninsula Clean Energy 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. Peninsula Clean Energy's programs include advancing the adoption of

electric vehicles and transitioning building fossil fuel uses to low carbon electricity. For more information on Peninsula Clean Energy, please go to www.peninsulacleanenergy.com.

As part of its mission-driven, collaborative, not-for-profit, locally-focused roots, Peninsula Clean Energy is committed to the following:

Organizational Priorities

- Design a power portfolio that is sourced by 100% carbon-free energy by 2025 that aligns supply and consumer demand a 24 x 7 basis
- Contribute to San Mateo County reaching the state's goal to be 100% greenhouse gas-free by 2045

Strategic Goals

- Secure sufficient, low-cost, clean sources of electricity that achieve Peninsula Clean Energy's priorities while ensuring reliability and meeting regulatory mandates
- Strongly advocate for public policies that support Peninsula Clean Energy's Organizational Priorities
- Implement robust energy programs that reduce greenhouse gas emissions, align supply and demand, and provide benefits to community stakeholder groups
- Develop a strong brand reputation that drives participation in Peninsula Clean Energy's programs while ensuring customer satisfaction
- Employ sound fiscal strategies to promote long-term organizational sustainability
- Ensure organizational excellence by adhering to sustainable business practices and fostering a workplace culture of innovation, diversity, transparency, and integrity

3 RFP SCHEDULE

This solicitation shall be conducted in two steps in an effort to be respectful to the time of all participants.

Step 1: Respondents are asked to provide basic information about their experience and prior work particularly relevant to the successful completion of this project. Peninsula Clean Energy will conduct an initial review of responses and, based on relative qualifications of Respondents, invite those deemed most qualified to move to Step 2.

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Step 2: Selected Respondents will receive additional site-specific information and provide a more detailed response, including pricing.

It is Peninsula Clean Energy's goal to advance this RFP to conclusion as expeditiously as possible. The following represents Peninsula Clean Energy's best estimate of schedule at the time of RFP writing and is subject to change, with appropriate notification to respondents.

RFP Stage	Event	Date
1	RFP Released. Question and Answer period open. Interested parties may submit questions and Peninsula Clean Energy will post answers publicly on a rolling basis.	July 16, 2020
2	Deadline for submission of Step 1, Initial Screen form	August 5, 2020, 11:59 PM
3	Qualifying Respondents will be invited to proceed to Step 2 and provided with information on specific deployment sites. Q&A period open for Step 2	August 12, 2020
4	Deadline for submission of Step 2 response (final submission)	August 28, 2020
5	Peninsula Clean Energy notifies Respondents that have been selected for shortlist	By September 11, 2020
6	Shortlist Interviews	By Sep 21 - 25
7	Peninsula Clean Energy completes final selection and notifies selected Respondent	By October 9, 2020
8	Contract negotiation and finalization	By October 30, 2020
9	Project kickoff	By November 2, 2020

- **Questions & Answers:** Respondents may submit questions concerning the RFP at DERSiteEvalServicesRFP@peninsulacleanenergy.com per the schedule outlined above.
- Please submit any questions with "Question: [Respondent name]" in subject line.

4 PROPOSAL SUBMITTAL

Proposals must be received per the schedule above and submittal must be by email per instructions in the Step 1 and Step 2 (if applicable) response forms. A Step 2 response form will be provided to those Respondents invited to move to Step 2.

By participating in Peninsula Clean Energy's RFP process, a Respondent acknowledges that it has read, understands, and agrees to the terms and conditions set forth in these RFP instructions. Peninsula Clean Energy reserves the right to reject any offer that does not comply with the requirements identified herein. Furthermore, Peninsula Clean Energy 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 Peninsula Clean Energy to enter into an agreement with any party, and Peninsula Clean Energy shall not be bound by the terms of any offer until Peninsula Clean Energy has entered into a fully executed agreement. Only electronic submittals will be accepted.

5 CONTENT OF RESPONSE

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

1) **Step 1 Response Form**

- Fill out form per instructions
- Attach resume of licensed professional engineer that will be assigned to project
- Attach example documentation package (no new materials required) as described

2) **Step 2 Response Form (if invited to Step 2)**

3) **Certificates of Insurance for the following coverages (if invited to Step 2):**

- 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, of at least \$1,000,000 (EPL not required for Sole Proprietor)

4) Supplier Diversity Questionnaire (If invited to Step 2):

Peninsula Clean Energy's Supplier Diversity Questionnaire can be downloaded at:

<https://www.peninsulacleanenergy.com/wp-content/uploads/2020/05/Peninsula-Clean-Energy-Supplier-Diversity-Questionnaire.docx>. Please note, your response (or lack thereof) will have no impact on your contract status or eligibility to work with Peninsula Clean Energy in accordance with state law.

6 REVIEW AND SELECTION PROCESS

Evaluation will be based on a combination of quantitative and qualitative criteria. Peninsula Clean Energy will evaluate each Offer against these criteria and select a subset of Offers to move to the Shortlist phase. The most qualified individual or firm will be recommended by the RFP Evaluation Committee based on the overall strength of each proposal, and the evaluation is not restricted to considerations of any single factor such as cost. The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

- Qualifications and experience of the Respondent, including capability and experience of key personnel to provide described services
- Ability to meet timelines or other requirements
- Assessment of ability of Respondent to be innovative, flexible, proactive, and collaborative in its work and working relationship with Peninsula Clean Energy and its project partners
- Cost to Peninsula Clean Energy for the primary services described by this RFP
- References
- Existence of and circumstances surrounding any claims and violations against you or your organization

7 AGREEMENT TERMS

Awardees will be required to enter into a contract using Peninsula Clean Energy's standard contract terms, which will be provided to those Respondents selected to move to Step 2.

Modification of the contract terms may be proposed by the Respondent for consideration by Peninsula Clean Energy but are not guaranteed to be accepted. Rejection of the final terms from Peninsula Clean Energy is grounds for disqualification. Shortlisted participants in Step 2 will be required to provide any redlines to the standard terms ahead of the interview phase.

8 SUPPLIER DIVERSITY

Consistent with its strategic goals, Peninsula Clean Energy 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, Peninsula Clean Energy 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, Peninsula Clean Energy'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 Peninsula Clean Energy is not legally-required to comply with GO 156, Peninsula Clean Energy'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, Peninsula Clean Energy will not use any such provided information in any part of its decision-making or selection process. Rather, Peninsula Clean Energy will use that information solely to help evaluate how well it is conforming to its

own policies and goals. Pursuant to California Proposition 209, Peninsula Clean Energy does not give preferential treatment based on race, sex, color, ethnicity, or national origin.

9 PENINSULA CLEAN ENERGY LEGAL OBLIGATIONS

Peninsula Clean Energy is not obligated to respond to any offer submitted as part of the RFP. All parties acknowledge that Peninsula Clean Energy is a public agency subject to the requirements of the California Public Records Act, Cal. Gov. Code section 6250 et seq. Peninsula Clean Energy acknowledges that another party may submit information to Peninsula Clean Energy that the other party considers confidential, proprietary, or trade secret information pursuant to 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 Peninsula Clean Energy 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. **Peninsula Clean Energy's Reserved Rights:** Peninsula Clean Energy 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 Peninsula Clean Energy 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:** Peninsula Clean Energy 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 AND SCOPE

Project Overview

Peninsula Clean Energy is seeking the assistance of an engineering services consulting firm with strong experience in site evaluation for solar PV and battery energy storage systems to support the procurement of these technologies at seven municipal sites owned by the County of San Mateo. The selected Respondent will work directly and collaboratively with the Distrusted Energy Resources (DER) staff at Peninsula Clean Energy as well as facility and county personnel in performance of key activities. Other equipment (such as EV charging stations) may be considered if appropriate to specific sites and of interest to facility owners.

The selected Respondent will act as an independent engineering consultant on DER project development from concept to deployment, but will not itself deploy, operate, or manage DERs at the project sites. A separate RFP will be conducted utilizing outputs from the scope of work here to contract vendors for DER deployment and operations. Please note that a Respondent entering into a contract for this project with Peninsula Clean Energy would be ineligible to participate in a follow-on procurement solicitation for DERs at sites evaluated for this project. It is expected, however, that the selected Respondent here would be retained to provide independent support and evaluation for a follow-on DER procurement at these sites.

Scope of Work

The overall project will consist of the following phases. More details on each phase are included in the Key Activities section below.

Phase 1	For the seven specified sites, working with Peninsula Clean Energy personnel and input from other stakeholders and organizations as necessary, develop Project Packages that will be used in a follow-on solicitation to obtain bids from vendors to deploy and operate specified DERs. A Project Package will include the minimum sufficient documentation that a DER vendor can confidently bid to deploy the proposed DER(s) from the documentation in the package alone, without needing to conduct site visits and do a separate engineering review.
Phase 2	Assist Peninsula Clean Energy in the development of the above-referenced solicitation to contract a DER vendor(s) for deployment and operations of proposed DERs and evaluation of vendor(s).
Phase 3	Provide independent engineering oversight during project construction, commissioning, and initial operations.
Potential Follow-On Project	Evaluate opportunities to expand the methods, workflows, and learnings developed in this project to develop a standardized process to expedite future DER site evaluations.

The primary goal of these efforts is that the solar + storage systems (expected to be solar PV coupled to a BESS), along with any other DERs selected for sites, are safely and successfully deployed at each of the seven project sites. These systems will be operated primarily to:

- Provide dispatchable renewable energy that helps Peninsula Clean Energy meet its clean energy targets
- Reduce customer energy bills (if behind-the-meter)
- Provide resiliency backup for critical loads in the event of grid outages, if applicable to site

Key Activities

Key activities for each phase are noted below. Note that these are proposed as a guide, but Respondent should use its own expertise to determine any other key activities required in support of the overall project goal. Note that "DER" should be understood to be solar PV or coupled solar PV + battery energy storage system.

Phase 1 Key Activities:

- Conduct walkdown at each facility to document/take measurements of site attributes as necessary to develop DER sizing and configuration options and for creation of Project Packages
- Analyze facility loads to inform DER equipment selection, including analysis of financial benefits/impacts to end customer
- Identify critical loads (with facility manager input) and costs required for segregating those loads for backup by DER (if applicable to site)
- Evaluate structural integrity and requisite load-bearing capabilities of any structures in or on which DER equipment would be installed, along with informed cost estimation of any required structural improvements to enable DER deployments
- Evaluate potential interconnection options - Behind-the-Meter Rule 21 Non-Export, Rule 21 Export, and in-front-of-the-meter WDAT. This includes identification and preliminary cost estimation for any required electrical equipment, assessment of likelihood of interconnection approval by PG&E, expected timeline, and potential upgrade costs
- Estimate monthly production of energy delivered to electric grid that accounts for any site-specific attributes that would affect onsite generation
- Identify and evaluate permitting requirements, costs, and any required facility upgrades or other costs to obtain necessary permits
- Determine DER system sizing and associated validation of required space and capability to connect to facility electrical panel, along with identification and pricing of any required site electrical or other upgrades to support DER equipment
- Evaluate eligibility of proposed DERs to qualify for ITC, SGIP, and other applicable incentives and quantify expected incentives
- Estimate financial revenues for considered DER configurations over the course of equipment lifetime
- Determine components of Project Package and validate as necessary with DER vendors to ensure it will meet requirement that vendor could bid on project from Package without requiring its own site walkdown and engineering review
- Create Project Package for each site, which shall include drawings, diagrams, notes, and report(s) that characterize the proposed DER deployment and provides sufficient information for a DER vendor to provide a high confidence bid on the project. For the purposes of clarity, this is not to develop documentation as if for an EPC contract. This is a minimum-but-sufficient level of documentation for the purposes of an equipment vendor providing an accurate bid, as if the DER vendor itself had done the site walkdown to prepare a bid.

Phase 2 Key Activities:

- Assist Peninsula Clean Energy staff as necessary in creation of a follow-on solicitation to procure a DER vendor(s) to deploy specified DERs

- Assist Peninsula Clean Energy in technical evaluation of DER vendor proposals in response to follow-on solicitation
- Determine oversight activities for Phase 3

Phase 3 Key Activities:

- Conduct periodic oversight activities as determined in Phase 2 to ensure projects are deployed and function as specified
- Work with Peninsula Clean Energy staff, DER vendors, facility staff, county personnel as necessary in the resolution of any technical problems that arise during deployment

Potential Follow-On Project:

- Work with Peninsula Clean Energy staff in the potential expansion of this project to additional DER sites and development of a standardized process for DER site evaluation

Project Sites

The types of sites in this project vary and include a jail, a medical center, a youth service center, a convention center, a landfill, and two airports. Some of these facilities will have space for behind-the-meter energy applications, and some may be better suited for front-of-meter applications. In addition, different technologies may be suitable for different sites. The full, unredacted site list will be made available to respondents who are selected to move to Step 2.

Project Execution Timeline

Peninsula Clean Energy endeavors to execute this project as expeditiously as possible. It is expected that Project Packages will be completed for all sites within 3 months of execution of a contract arising from this solicitation.

Procurement of DER vendor(s) will follow immediately thereafter.

12 RESPONSE FORM

Interested Respondents should complete the separate document **Respondent Form - Step 1 - Initial Screen** and return with other requested documentation per instructions in the document.