



# Request for Proposals

Peninsula Clean Energy, a California Joint Powers Authority, is seeking proposals from interested vendors for Used Electric Vehicle Rebate Program.

**Updated November 17, 2020 (see highlights in yellow)**

**Responses are due Friday, December 4, 2020 at 5pm Pacific Time.**

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# 1 RFP OVERVIEW

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Peninsula Clean Energy programs include advancing transportation and building electrification, resilience and load shaping, and other clean energy initiatives. This Request for Proposals (RFP) seeks offers from qualified providers to implement a used electric vehicle rebate program with a focus in low-income residents. Peninsula Clean Energy will evaluate the offers received from this RFP and plans to negotiate and execute a contract with the selected proposer. The contract will 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 Proposers to describe their qualifications and experience and explain how they can contribute to services requested.

## 2 ABOUT PENINSULA CLEAN ENERGY

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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. It is one of only three Community Choice Aggregators in California to obtain investment-grade credit ratings. 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](http://www.peninsulacleanenergy.com).

Service Territory: Peninsula Clean Energy serves all of San Mateo County, its twenty cities and towns and unincorporated areas. San Mateo County has a population of approximately 766,000 people. Peninsula Clean Energy has approximately 290,000 electric accounts, of which approximately 265,000 are residential customers. The city of Los Banos in Merced County is anticipated to join Peninsula Clean Energy as a member agency. If approved, service to Los Banos is expected to begin January 2022, at which point Los Banos residents would also be eligible for Peninsula Clean Energy programs. Los Banos has a population of approximately 41,000 people.

As part of its mission-driven, collaborative, not-for-profit, locally-focused roots, Peninsula Clean Energy is committed to two key organizational priorities:

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

and to the following 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

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- Implement robust energy programs that reduce greenhouse gas emissions, align energy 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

Event	Date
RFP issued	Tuesday, October 27, 2020
Deadline for Proposers to submit questions	Friday, November 13, 2020
Responses to questions received published on Peninsula Clean Energy's website	Friday, November 20, 2020
Deadline for Proposers to submit proposals	Friday, December 4, 2020 at 5pm
Possible interviews of top Proposers	Monday-Thursday, December 14-17, 2020
Anticipated date Peninsula Clean Energy will notify awardee	Monday, December 21, 2020
Anticipated date for Board approval of contract	Thursday, January 28, 2021

- Question & Answer:** Proposers may submit questions concerning the RFP at [programs@peninsulacleanenergy.com](mailto:programs@peninsulacleanenergy.com). All questions and answers will be shared with all Proposers and will be posted on Peninsula Clean Energy's website. Questions received in advance of the deadline will be responded to in advance of the response date where feasible.
- Offer Review:** Peninsula Clean Energy will evaluate all Offers according to the criteria listed below.

## 4 PROPOSAL SUBMITTAL

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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 - <Vendor Name> - Used EV Program".

By participating in Peninsula Clean Energy's RFP process, a Proposer 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

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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 pg.):**

- 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 (8 pg. max):**

- Analysis of the population(s) to reach through the program.
- Approach and methods for achieving the Scope of Work described below (Section 11).
- Goals and measurable objectives including targeted metrics on outreach.
- Key challenges and resolutions.
- Staffing plan and project team structure.

3. **Qualifications and Experience (4 pg. max):**

- A brief summary of vendor’s history and background.
- A summary of similar programs completed or worked on recently in California.
- A summary of program experience within San Mateo County.
- Existing community relationships with relevant stakeholders in San Mateo County, such as low-income residents and/or community-based organizations who work with low-income community members.
- Summary of program experience and community relationships in the city of Los Banos or the Merced County/Central Valley region, if any
- Familiarity with state and regional electric vehicle incentive programs.
- Identification of relevant licenses and certifications.

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4. **Proposed Schedule** (table or chart, 1 pg. max)
5. **Administration Budget proposal** (2 pg. max, include rate schedule)
6. **Project staffing and credentials** (no page limit)
7. **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.
8. **Confirmation of acceptance of contract terms** or explanation of proposed contract modifications (see Agreement terms)
9. **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)
10. **Supplier Diversity Questionnaire (Optional):** 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.

**UPDATE:** the link to download the questionnaire was inadvertently omitted from the original RFP and has been added November 17<sup>th</sup>.

## 6 REVIEW AND SELECTION PROCESS

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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:

1. Completeness of the proposal, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed approach/methods
2. Qualifications and experience of the firm and staff, and adequacy of the staffing plan
3. Past work experience, especially with underserved or low-income communities
4. Relevant community relationships in San Mateo County and city of Los Banos
5. Familiarity with state and regional electric vehicle incentive programs
6. Overall cost effectiveness of the proposed administration budget
7. Project team's alignment with Peninsula Clean Energy's Sustainable Workforce Policy
8. Quality of references
9. Exceptions to Peninsula Clean Energy's contract template or insurance requirements

## 7 AGREEMENT TERMS

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Awardees will be required to enter into a contract using Peninsula Clean Energy's standard contract terms. Modification of the contract terms may be proposed by the Proposer 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 will be required to provide any redlines to the standard terms ahead of the interview phase.

Peninsula Clean Energy's standard contract terms are available for review here (subject to change): <https://www.peninsulacleanenergy.com/current-rfp-rfo/>

## 8 INCLUSION OF NON-PARTICIPATING AGENCIES

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Peninsula Clean Energy 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 Peninsula Clean Energy'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; Peninsula Clean Energy shall not be responsible for any such purchases.

## 9 SUPPLIER DIVERSITY

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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](http://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.

## 10 LEGAL OBLIGATIONS

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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.

# 11 GENERAL TERMS AND CONDITIONS

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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.

# 12 DETAILED PROJECT DESCRIPTION AND SCOPE

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## 1 Project Overview:

Peninsula Clean Energy's mission is to reduce greenhouse gas (GHG) emissions and reinvest in the communities it serves, San Mateo County and pending approval the city of Los Banos. This program is intended to drive adoption for EVs in the used vehicle market, especially for low-income customers.

Peninsula Clean Energy has been running a [Used EV rebate program](#) for low-income San Mateo County residents since March 2019. The program provides incentives of up to \$4,000 for income-qualifying residents to purchase used plug-in hybrid electric vehicles (PHEVs) or all battery electric vehicles (BEVs). Peninsula Clean Energy's incentive can be combined with other low-income EV incentives programs, which include the statewide Clean Vehicle Assistance Program and the Bay Area-wide Clean Cars for All Program and Driving Clean Assistance Program. A key objective of the Peninsula Clean Energy program is to provide robust EV education and inform residents about the other programs and encourage them to apply.

Starting Q1 2021, Peninsula Clean Energy plans to offer Used EV incentives to all San Mateo County residents in addition to the larger incentives for low-income residents. To decrease customer confusion, Peninsula Clean Energy plans to combine the current low-income used EV program and the upcoming general used EV rebate into one program.

This revamped program would have a "base" incentive available to any resident and an "add on" for low-income residents. The base incentive will be \$700 for PHEVs or \$1,000 for BEVs, and the low-income add on will be +\$1,000 if stacking with another program or +\$3,000 if not. The incentive will be a post-purchase rebate, though participants would have the option to apply before purchasing and get their rebate reserved. Participants will be able to purchase their vehicle at the dealership or online retailer of their choice, but no private sales will be allowed. The program volume is expected to be up to 700 vehicles per year.

The selected Consultant will administer the revamped program open to all San Mateo County residents (and pending approval, the city of Los Banos residents starting January 2022). However, Peninsula Clean Energy wishes to provide robust EV education and assistance to low-income residents, thus a key aspect of the Consultant's scope of work would be focused on the low-income segment. The Consultant tasks are described in more detail below.

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In addition to the Used EV rebate program, Peninsula Clean Energy has a number of other EV incentive and engagement marketing programs, which include:

- An annual time limited New EV Rebate program that provides rebates to any San Mateo County resident who purchases a new EV during the fourth quarter
- An EV information phone line and chat box on the Peninsula Clean Energy website for residents to ask general EV questions
- Rebates for residents to rent and test drive an EV free of cost

The selected Consultant will lead outreach to the low-income segment for the Used EV Rebate program, however these EV engagement programs and Peninsula Clean Energy's broad-based EV marketing efforts will support the program as well.

### 2 Term and Budget Range

The contract will be for three years with a maximum administration budget of \$180,000. A proposed itemized budget and payment terms should be included in the proposal and the final budget and terms will be mutually determined by Peninsula Clean Energy and the selected Consultant.

### 3 Consultant Tasks

#### 3.1 Program Administration

Consultant will execute required project administration. Consultant activities will include:

1. Provide monthly progress reports
2. Participate in regular meetings and calls with Peninsula Clean Energy as mutually determined
3. Provide budget reporting
4. Provide contracts for all major subcontractors, if any
5. Provide a final report

#### 3.2 Program Set Up

Consultant will assist Peninsula Clean Energy in setting up the plan for program launch. Consultant will:

1. Jointly refine program objectives and measurable metrics
2. Develop a detailed project plan
3. Characterize the target customer base, anticipated needs, and approach to reach them
4. Develop program documents, forms, email templates, and outreach materials as mutually determined with Peninsula Clean Energy
5. Ensure its team's familiarity with the other low-income EV incentive programs

### 3.3 Marketing & Outreach

Marketing and outreach tasks for the program will be shared by Peninsula Clean Energy and the Consultant. Peninsula Clean Energy will lead broad-based marketing of the program and Consultant will lead outreach specifically targeting the low-income resident segment, both in San Mateo County and city of Los Banos (pending approval). Marketing and outreach plan will be jointly developed by Peninsula Clean Energy and the Consultant. Roles are anticipated to be as follows:

Consultant tasks:

1. Lead marketing and outreach targeting low-income residents
2. Develop content for low-income resident outreach, which may include program fliers, emails, and postcards. This may include translating materials into relevant languages.
3. Conduct targeted outreach to low-income residents, which may include phone, email, and in-person outreach such as tabling at community events
4. Explore hosting virtual or in person (when such opportunities become available again) workshops on the program
5. Utilize existing relationships with community-based organizations who work with low-income residents to communicate information about the program

Peninsula Clean Energy tasks:

1. Lead broad-based marketing for the program
2. Develop web content on Peninsula Clean Energy website
3. Include program information on Peninsula Clean Energy social media and owned media channel platforms (e.g. Facebook, Twitter, Nextdoor, newsletters)
4. Develop digital ad campaigns
5. Include program information in community outreach via community outreach partners
6. Include program information in EV engagement marketing programs highlighted above
7. Review and approve any program documents developed by Consultant

Consultant should include a clear outreach approach in its proposal, including suggested tactics to reach low-income San Mateo County and Los Banos (pending approval) residents.

### 3.5 Interest Form Screening & Customer Inquiries

In addition to outbound outreach, the program will also have an inbound interest form. The interest form will seek to identify whether the interested customer is low-income or not and whether they have already purchased an EV or not. Consultant will:

1. Manage and screen interest forms received, such that:

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- a. If the customer has already purchased an EV, Consultant will provide information and steps for applying for the rebate via email
  - b. If customer is not low-income and has not purchased an EV yet, Consultant will provide steps for reserving and applying for a rebate via email
  - c. If customer is low-income and has not purchased an EV yet, Consultant will schedule a call with the customer and provide additional education and support, as described below
2. Manage all customer communications for the program, including responding to inquiries and questions about the program
  3. Provide reports on contact metrics and produce/update FAQs

### 3.6 Low-Income Resident Support

Low-income residents who have not yet purchased a vehicle are eligible for other low-income EV incentive programs, in addition to Peninsula Clean Energy's incentive, such as those mentioned in the Program Overview section. Peninsula Clean Energy wants to ensure residents are aware of those programs and are encouraged to apply. For low-income residents who have not yet purchased a vehicle, Consultant will:

1. Schedule a phone call with the resident and:
  - a. Offer education and answer questions regarding EVs, including information on vehicles options, how to charge, etc. Consultant must develop the content of the education in consultation with Peninsula Clean Energy
  - b. Inform them of all programs they are eligible for and based on their situation, recommend which program(s) to apply for
  - c. Explain the application process for the recommended program and offer assistance applying for it
  - d. Explain the application process for Peninsula Clean Energy's rebate
2. If the resident wants assistance applying for the recommended program, assist them throughout the process which may include assistance in gathering documents and filling out applications forms. Peninsula Clean Energy anticipates most residents will choose to apply on their own and not require additional assistance but would like to offer this as an option

Peninsula Clean Energy would like to offer this support to non-English speakers as well. Consultant should specify in its proposal which languages in addition to English it would be able to provide support in.

### 3.7 Application Review & Rebate Processing

Consultant will manage all rebate incentive applications including confirming eligibility and reviewing supporting documentation for both for low-income and non-low-income applicants. This includes:

1. A copy of the vehicle purchase contract for all applicants
2. Income eligibility documents for low-income applicants. If applicant is stacking the Peninsula Clean Energy rebate with another low-income EV program, applicant would be asked to provide proof of participation (such as an award letter) and Peninsula Clean Energy would accept that to meet the income eligibility criteria. If a participant is not stacking with another program but applying for the increased low-income rebate, Consultant will request and review participant's income documents, which may include copies of tax returns, pay stubs, and other income-related documents if warranted to verify income eligibility.

Once an application is approved, a rebate check would be issued and mailed to the participant. Rebate mailing should be Peninsula Clean Energy branded and include developed marketing messages and potentially additional collateral. The participant rebates can either be issued and mailed by Peninsula Clean Energy or by the Consultant (for Peninsula Clean Energy to reimburse). Consultant should include administration budget for both scenarios in its proposal, clearly identifying the added cost, if any, of having the Consultant issue the rebates. Peninsula Clean Energy will determine which approach to undertake in consultation with the selected Consultant.

### 3.3 Project Tracking & Data Sharing

Peninsula Clean Energy utilizes a Salesforce-based CRM platform to track customer's interest and participation in its programs, among other things. This Used EV rebate program will require a platform to manage interest forms and applications intake and may include a reservation system for customers who apply before purchasing an EV. There are two general options in which this can be managed:

1. If the Consultant has its own CRM, the Consultant may manage intake of applications and the reservation pipeline in such platform. Consultant will then determine a data sharing mechanism with Peninsula Clean Energy's CRM and transfer all data on a regular basis as mutually determined
2. If the Consultant does not have its own CRM or prefers to use Peninsula Clean Energy's, Peninsula Clean Energy may give the Consultant limited access to its CRM to manage applications there

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Consultant should include in its proposal which option it prefers, if both are feasible. If there is a difference in the administration budget, Consultant should make that clear in the its proposal. Peninsula Clean Energy will determine which approach to undertake with the selected Consultant.