



Request for Proposals

Peninsula Clean Energy, a California Joint Powers Authority, is seeking proposals from interested vendors for *Public Agency Electric Vehicle Fleet Transition Assistance*.

Responses are due February 8, 2022 at 5 PM Pacific Time.

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1 RFP OVERVIEW

Peninsula Clean Energy Authority issues this Request for Proposals (RFP) to seek offers from qualified providers for public agency electric vehicle fleet transition assistance. 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.

1.1 Background

Peninsula Clean Energy's mission is to reduce greenhouse gas (GHG) emissions in its service territory, which includes San Mateo County, and shortly, the city of Los Banos. Peninsula Clean Energy's goal is to be carbon neutral by 2035, 10 years ahead of the state, which Peninsula Clean Energy aims to support through investment in local community programs. Transportation emissions are the most significant challenge to deep decarbonization in San Mateo County. These emissions account for about 50% of direct emissions within the County.

Public fleets represent a relatively small, but important, part of the on-road vehicle fleet in San Mateo County. Public agency fleets comprise about 2,000 total vehicles within San Mateo County. Most agencies have 100 or fewer vehicles in their fleet with the County of San Mateo's fleet representing the largest share at about 1,000 total vehicles. Vehicle fleets represent a significant component of local agency Climate Action Plans and fleet electrification is a core strategy to reduce emissions. In addition, public agency fleets can be assets that are highly visible to the community, and the electrification of these vehicles are a visual testimony to the agency's emissions-reductions efforts.

Local public agency fleet managers face a daunting challenge in quickly electrifying their fleets. Electric vehicles require new charging infrastructure, often have a much higher purchase price than their internal-combustion engine counterparts, require new technician training, may involve navigating and applying to various state and local rebate programs, and understanding new fuel management practices to avoid costly demand and on-peak energy charges. Furthermore, fleet managers often don't have the time or expertise to handle these projects.

This program will provide comprehensive assistance to fleet managers in their electrification efforts by providing a full package technical assistance including fleet analysis, infrastructure project scoping, help with rebate programs, and post-project charging recommendations.

2. ABOUT PENINSULA CLEAN ENERGY

Peninsula Clean Energy is a Community Choice Aggregation agency. It is the official electricity provider for San Mateo County and, beginning in 2022, for the City of Los Banos. Founded in 2016 with a mission to reduce greenhouse gas emissions in the county, the agency serves 295,000 customers by providing more than 3,500 gigawatt hours annually of electricity that is 100% renewable or carbon-free and at lower cost than PG&E. As a community-led, not-for-profit agency, Peninsula Clean Energy makes significant investments in our communities to expand access to sustainable and affordable energy solutions. Peninsula Clean Energy is on track to deliver electricity that is 100% renewable on a 24/7 basis by 2025. The agency has earned investment grade credit ratings from Moody's and Fitch. For more information on Peninsula Clean Energy, please go to www.peninsulacleanenergy.com.

3 RFP SCHEDULE

Event	Date
RFP released	January 4, 2022
Deadline to submit questions	January 18, 2022
Answers to submitted questions are posted	No later than January 25, 2022
Deadline to submit responses	February 8, 2022, 5 PM Pacific Time
Interviews	February 14 – 18, 2022 (Estimated)
Tentative award selection	February 25, 2022

4 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 - <Vendor Name> - EV Public Fleets”.

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

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:**
 - Describe how you would achieve the Scope of Work described below.
 - Goals and measurable objectives.
 - Key challenges and resolutions.
 - Schedule to complete objectives.
3. **Qualifications and Experience:**
 - Demonstrated expertise with electric vehicle fleets and charging infrastructure.
 - Prior experience planning and executing charging infrastructure and vehicle replacement projects for private or public fleets.
 - Familiarity with public agency contracting processes.
 - Deep knowledge of various state and local funding resources for public fleet electrification.
4. **Price:**
 - Include the price to provide the services outlined in this RFP.
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):**
 - 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 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:

- 6.1. Qualifications and experience of the entity, including capability and experience of key personnel and experience with other public and/or private agencies to provide these services
- 6.2. History of successfully performing services for public and/or private agencies fleets
- 6.3. Expertise with the electric vehicle fleet and charging infrastructure marketplace
- 6.4. Completeness of the proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services
- 6.5. Ability to meet any required timelines or other requirements
- 6.6. Existence of and circumstances surrounding any claims and violations against you or your organization
- 6.7. Cost to Peninsula Clean Energy for the primary services described by this RFP
- 6.8. References
- 6.9. Peninsula Clean Energy encourages responses from bidders whose primary and/or subcontractors listed in a partnership are certified as Minority Business Enterprise/Women Business Enterprise (MBE/WBE), Disadvantaged Business Enterprise (DBE), or equivalent.

7 AGREEMENT TERMS

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:

<https://www.peninsulacleanenergy.com/wp-content/uploads/2021/04/Contract-1-STANDARD-Template-January-2021.pdf>

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 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. 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 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 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

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

Project Overview:

Peninsula Clean Energy is seeking a qualified team to provide fleet electrification planning assistance to public agency fleets in Peninsula Clean Energy's service territory. As mentioned in the RFP overview (section 1.1), fleet managers are faced with enormous challenges when electrifying their fleet operations. This program will provide a full suite of technical assistance components to fleet managers from overall planning to project design to post-project charging optimization.

The team will provide hands on assistance to public agency fleet managers that have committed to replacing vehicles in their fleets with electric alternatives in the next year. Technical assistance will be a comprehensive package, further outlined in this scope of work, including a fleet replacement plan, specific project engineering and design, including construction documents to be utilized during the installation bidding process, EV charging infrastructure recommendations, recommended charging schedules specific to vehicle duty cycles to minimize ongoing costs, and a funding plan for each project that outlines and assists each agency in obtaining rebates, grants, and other funding assistance.

The goal of the program is to provide this level of technical assistance to about 2-3 local agency fleets per year over the 3-year scope of the program. The program is open to all public agencies in Peninsula Clean Energy's service territory and electric vehicles of all types and classes are eligible, though vehicles and charging infrastructure is expected to be mostly fleet-focused. Agency recruitment will be led by Peninsula Clean Energy staff. In addition to the technical assistance requested in this RFP, Peninsula Clean Energy is also providing limited gap-funding assistance to help pay for vehicle replacements and charging infrastructure, to be administered by Peninsula Clean Energy.

Scope of Work:

The scope of work of this project is outlined in the key objectives and other sections below.

Objectives:

1. Develop 7-10-year fleet replacement and procurement plans for approximately 2-3 public agencies per year. This shall include duty cycle analysis, calculation of vehicle charging needs, recommended charging infrastructure, specific electric replacement vehicle options, including pricing and availability, a replacement schedule that factors in vehicle market readiness and agency priorities, and overall implementation and replacement budget.
2. In close collaboration with selected public agencies, produce 2-3 electric vehicle charging infrastructure project plans per year, including architectural drawings, single-line diagrams,

core specifications needed for an agency to bid EV charging installation projects, and estimated project budgets.

3. For each specific project, include a detailed funding package plan that recommends specific grants, rebates, or various utility programs for the vehicles and/or charging infrastructure in the project, as necessary, to minimize cost for the agency.
4. For each specific project, develop optimized charging schedules to minimize operating costs. Bidders may seek to partner with charge management system providers that allow for seamless charge monitoring for fleet managers.

12.1 Program Tasks

12.1.1 Local public agency staff engagement

In coordination with Peninsula Clean Energy staff, facilitate outreach and engagement with local agency staff and other stakeholders, as necessary, to gather baseline information (e.g. fleet inventories, “as built,” current electrical infrastructure layout, panel schedules, and capacity, etc.), determine near-term and long-term fleet transition policies and planning, scope specific projects with selected agencies, and provide ongoing support during pre-construction planning.

12.1.2 Develop vehicle replacement and procurement plans for 2-3 public agencies per year

The objective of the vehicle replacement and procurement plans is to outline a roughly 10-year plan for each agency, at a relatively high-level as the electric vehicle market is subject to ongoing changes. The plans should include an analysis of their total vehicle fleet, estimated duty cycles and vehicle use, factor in any relevant public fleet emissions reductions targets set by local or state agencies (e.g. the California Air Resources Board Advanced Clean Fleet rules for public agencies and Peninsula Clean Energy’s goal of zero emissions by 2035), and include the following:

1. Identification of 1 for 1 electric vehicle alternative options for each vehicle in the fleet, noting market availability and when replacements are not yet available or practical due to conditions such as range, hauling capacity, or other use cases (e.g. pursuit-rated police vehicles). Recommended electric vehicle replacements don’t need to be an exhaustive list. Contractors should note general availability of these vehicles on cooperative purchasing contracts (e.g. Sourcewell, Drive EV Fleets, California Department of General Services, etc.) to streamline future vehicle procurement.
2. High-level replacement schedule that outlines with the fleet’s typical replacement cycle, but also factors in state or local electrification timing requirements such as the California Air Resources Board Advanced Clean Fleet regulations. When practical, replacement schedules should start with “low-hanging fruit” options such as pool cars, light-duty

vehicles, etc. as well as agency priority replacements, before moving to more difficult use cases over time.

3. Estimated purchase price and an approximated total cost of ownership of each vehicle replacement in comparison to the internal-combustion engine equivalent over the service life of the vehicle.
4. Calculation of each vehicle replacement's estimated annual electricity needs.
5. Recommended charging infrastructure types for each vehicle, which factors in estimated daily duty cycles (e.g. Level 2, high-power Level 2, DC fast charging of various power capacities, etc.) and vehicle charging needs.

Optionally, vehicle replacement and procurement plans should note the following, when applicable:

1. Consolidation opportunities to replace multiple underutilized vehicles with a fewer number of vehicles.
2. "Right-sizing" opportunities to replace a vehicle with a smaller vehicle, if the duty cycle or use has changed.

For frame of reference, as noted previously, the typical public agency fleet has fewer than 100 vehicles.

12.1.3 Produce 2-3 charging infrastructure project plans per year

Each agency in this program will be asked to commit to at least one charging infrastructure and vehicle replacement project, of at least 5 vehicles, in the first year. To support these efforts, the contractor selected in this RFP, will produce 2-3 complete project plans per year for the installation of EV charging infrastructure. Project plans should seek to include other utility programs such as PG&E EV Fleets Program, which covers electricity upgrades and other front of the meter capacity upgrades, as relevant. Project plans should also future proof as much as practical and relevant. These plans shall include:

1. Recommendations for specific charging infrastructure for the vehicle replacements identified, including piggybacking and cooperative contract procurement options (e.g. Sourcewell, Drive EV Fleets, etc.), if available, to streamline project timelines.
2. Project cost estimate.
3. Construction engineering documents that the agency can use in a public bid to hire contractors for installation services. These documents will include:
 - a. Project description and any relevant specifications

- b. Architectural renderings (a.k.a. “as built”) of the parking areas and other facilities, as relevant
 - c. Electrical single-line diagrams
 - d. Other documents, as required by the public agency, to bid these charging station installation projects or receive permits
4. Electrical load analyses, as needed.

12.1.4 Detailed funding package overview

For each project described in section 12.1.2 above, the contractor will provide a detailed overview of currently available funding options for both the vehicles and charging infrastructure from relevant state and local agencies, including the Clean Vehicle Rebate Project, Hybrid and Zero-Emission Truck and Bus Boucher Incentive Project, PG&E EV Fleets Program, the Bay Area Air Quality Management District, Peninsula Clean Energy, and others to be determined. The overview should include any requirements unique to the funding agency such as vehicle utilization, access, vehicle types or use cases, etc. Contractors should seek to opportunities to stack funding, as relevant and allowable, to minimize costs to public agencies. Contractors shall also provide all information to the agencies to minimize effort needed by the fleet managers to apply for funding.

12.1.5 Charge management system

For each project described in section 12.1.2 above, the contractor shall provide a charging optimization plan that incorporates the vehicles’ duty cycles and recommends charging schedules that minimize operating costs through off-peak charging and reduction in energy demand charges. Bidders may seek to partner with energy management firms that offer a platform capable of managing energy across various EV chargers from multiple manufacturers and provide tools and functionality relevant to fleet managers such as scheduled charging that incorporates specific energy rates, demand charge mitigation, vehicle duty cycles (total energy needed and at what time a vehicle is needed to be charged by), etc. If such a partnership is utilized, prices for the energy management system should be listed separately.

12.2 Administrative Tasks

Consultant shall provide the following:

12.2.1 Kickoff Meeting

Participate in a kickoff meeting with PCE to review objectives, budget, timeline, administrative processes, and contract at a mutually determined time.

12.2.2 Monthly Progress Report and Call:

Provide a short monthly progress report and associated call with the designated PCE contract administrator. This report will outline project progress, challenges encountered, a description of additional funding or resources secured, and objectives for the following month. Major supplementary documentation developed in the course of work must be submitted with the Progress Report as agreed with the PCE contract administrator. This supplementary documentation may include technical designs, vehicle and/or charging infrastructure recommendations and/or specifications, and any materials developed for partner use.

12.2.3 Expense Report:

Provide a quarterly expense report following the third month after the contract start date and every third month thereafter, or another schedule as mutually determined, submitted with the corresponding Monthly Progress Report, documenting expenses including: labor (hours, rate, total), subcontractor expenses (with invoices), and equipment (with invoices). The expense report must include the total expenditures for the quarter and running expense total.

12.2.4 Annual Report

Provide an annual report that includes an executive summary, major accomplishments in the prior year, lessons learned and recommendations for future work, overview and assessment of fleet replacement plans and EV charging project plans delivered in the previous year, and financial summary comparing actual expenditures to the project budget.

12.2.5 Final Report

Provide a final report for public distribution that includes an executive summary, challenges encountered and lessons learned, best practices for other public agency fleets, case studies, etc.

12.2.6 Budget and Term

Peninsula Clean Energy expects to spend between approximately \$300,000 - \$400,000 on this program, with the option to increase the budget to provide the tasks covered in this RFP to additional local agencies, at Peninsula Clean Energy's discretion. The program term is 3 years.