



Request for Proposals

Request for Proposals

Peninsula Clean Energy, a California Joint Powers Authority, is seeking proposals from interested vendors for a **Single-Family Home Electrification Program Service**.

Responses are due **October 27, 2023 at 5:00pm Pacific Time**.

Updated on September 28, 2023 as follows:

1. Added Section 5.12 under the Content of Response.
2. Updated RFP [Cost Table](#) Spreadsheet to clarify categories under the “Non-Installation Costs Estimates by Task” table.

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1 RFP OVERVIEW

Peninsula Clean Energy Authority (PCE) issues this Request for Proposals (RFP) to seek offers from qualified providers for a building electrification turnkey and direct install service for single-family homes.

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

Building electrification¹ is a critical strategy for decarbonization. Currently, PCE and other local and state programs provide building electrification financial incentives and technical assistance to help households electrify their homes. While incentives and technical assistance may assist early adopters in transitioning to all-electric homes, deeper assistance is needed to reach more homes. This is true for both low-income and market-rate households. For many customers the economic, logistical, and technological barriers to electrification are significant. Therefore, PCE envisions a program that provides building electrification installation services at no- or low-cost to single-family households.

In addition, Silicon Valley Clean Energy Authority (SVCE), the community choice aggregation that serves 13 cities in Santa Clara County, will be a participant in PCE's selection process for this RFP. SVCE has similar scale, faces the same issues identified by PCE, and is considering whether to establish similar offerings and deliver these services in parallel with PCE's Single-Family Service. At SVCE's discretion, SVCE may decide to "piggyback" on this selection process to separately contract with the Proposer selected by PCE through this process. For more information about SVCE, visit www.svcleanenergy.org.

Through this RFP, PCE is seeking a third-party implementation team (hereafter referred to as "Consultant") to offer building electrification installation services for single-family homes (hereafter referred to as the "Single-Family Service"). **It is expected that the Consultant will be capable of managing the program and installing equipment, resulting in a team that includes both a program administrator and one or more installation contractors.** A list of

¹Defined as the replacement of methane "natural" gas equipment for space heating, domestic hot water, stove/oven, and clothes drying with efficient electric alternatives.

pre-bid webinar attendees will be publicly shared for prospective proposers to coordinate and team with other contractors and consultants.

The Consultant will work with PCE to finalize all aspects of the Single-Family Service design, including participation requirements and procedures, technical design guidelines, and other elements. Once the Single-Family Service is launched, the Consultant will be tasked with overseeing all aspects of the Service, including customer management, scheduling and installation management, payment management (including collecting payment from customers and third-party incentive programs), and homeowner support.

The services identified in the Scope of Work (see “Section 12”) are a major component of PCE’s overall strategy for building decarbonization developed as part of a detailed analysis and plan on decarbonization by 2035. These services are intended to provide no- or low-cost installation services for customers to complement existing incentives and financing. In addition, PCE is developing further support through “one-stop-shop” website and “concierge” service for program navigation and technical assistance. These are not included in this RFP.

The Single-Family Service will electrify single-family residences via three program elements:

3. **Income-qualified direct install electrification (“Direct Install”)** – This element will provide direct-installation services² for eligible low-income customers living in single-family residences. This service will build on PCE’s existing Home Upgrade program to provide whole-home or partial electrification and minor home repair at no cost to the homeowner.
4. **Cost-share turnkey electrification (“Cost-Share Turnkey”)** – This element will provide turnkey installation services³ for electrification measures to market-rate customers living in single-family residences. Wiring, circuitry, plumbing, carpentry, and other services required to enable the installation of the equipment will be included in the installation.
5. **Emergency Water Heater Replacement** – This element of will provide rapid replacement of failing natural gas water heaters with a heat pump water heater under qualified conditions. If remediation is required, such as an electrical circuit, a loaner gas water heater may be installed to ensure there is no service interruption while work proceeds through the Direct Install and Cost-Share Turnkey services.

1.2 Program Goals and Objectives

1. Ensure an affordable and easily accessible option for PCE customers to electrify their homes, including for emergency replacements.

² Direct installation means start-to-finish installation of equipment at no cost to the customer.

³ Turnkey installation means start-to-finish installation of equipment, which includes a co-payment contribution from the customer.

2. Provide safer, healthier, resilient, low/zero-carbon homes with improved indoor air quality and lower energy bills.
3. Electrify low-income homes in PCE territory with a target of at least 650 heat pump water heaters and 650 heat pump HVAC systems in three years.
4. Establish dedicated crews of trusted, experienced installers with high quality equipment capable of whole home electrification using advanced methods to minimize the need to upgrade PG&E service lines.
5. Encourage establishment of sustainable and diverse electrification workforce.
6. Leverage all possible local, state, and federal electrification incentives to reduce PCE and/or customer's direct costs.
7. Support PCE's load-shaping needs.

1.3 Term

The program is expected to be ongoing with the term of the contract estimated at three (3) years with the potential for renewal by written amendment.

1.4 Budget

The budget for the contract is intended to for all tasks as described in the Scope of Work, with PCE incentive funds flowing directly through the Consultant. Third-party incentive funds not directly managed by PCE are not reflected in the budget as the Consultant is expected to capture those funds directly. Customer co-payments will be determined as a part of the program design but are expected to flow through the Consultant.

A summary of electrification costs may be found in PCE's 2035 Decarbonization analysis completed in 2022 ([slide 84](#)) however, proposers will be evaluated on the cost-competitiveness of measure costs. This project is not considered a public works project under the California Department of Industrial Relations (DIR). However, all positions on this project, including trade subcontractors, which have determinations under the DIR shall be paid prevailing wage or the equivalent to prevailing wage. This can be confirmed either through the California Department of Industrial Wages or via transparent compensation information provided to Peninsula Clean Energy. Labor costs provided in Proposer's [Cost Table](#) should reflect prevailing wages.

2 ABOUT PENINSULA CLEAN ENERGY

Peninsula Clean Energy is the not-for-profit locally led electricity provider for San Mateo County and Los Banos. Our mission is to reduce greenhouse gas emissions by expanding access to sustainable and affordable energy solutions. The agency serves over 300,000 customers by providing more than 3,500 gigawatt hours annually of electricity that is virtually carbon-free.

Since Peninsula Clean Energy launched in October 2016 customers have saved over \$100 million and over 1 million metric tons CO2e from our electric service compared to 2016 baseline, equivalent to over 140 million gallons of gasoline use. The agency has earned investment grade credit ratings from Moody’s and Fitch and S&P Global. For more information on Peninsula Clean Energy, please go to www.peninsulacleanenergy.com.

2.1 Single-Family Homes and Small Residential Building Characterization

In 2022, Peninsula Clean Energy performed an assessment of residential building stock based on the American Community Survey, US Census, and the [2019 Residential Appliance Saturation Survey](#). The following information can be found [here](#). Peninsula Clean Energy can provide the background tables for this information upon request. The entire PCE service territory is included in the services to be performed. A summary of homes in San Mateo County and the city of Los Banos are in the tables below:

Approximate Single-Family Homes in San Mateo County			
	Below 80% AMI	Above 80% AMI	Total
Owned with mortgage	30,098	10,191	95,390
Owned outright	23,616	4,599	40,896
Rented	14,979	72,098	29,604
Total	68,693	86,888	165,890

Approximate Single-Family Homes in Los Banos			
	Below 80% AMI	Above 80% AMI	Total
Owned	5,793	10,374	16,167
Rented	5,403	4,953	10,356
Total	11,196	15,327	26,523

Expected installation counts for Direct Install and estimated installation counts for Cost-Share Turnkey programs can be found in the [Cost Table](#).

PCE and SVCE customers live in Public Safety Power Shutoff (PSPS) areas (more information on PSPS can be found [here](#)). At PCE’s discretion, providing direct or turnkey installation services in these areas might include right-sized resiliency (utilizing solar, storage measures, and/or heat reduction measures) to ensure customers have adequate energy supply during a PSPS event. Figure 1 shows potential areas impacted by PSPS events within PCE’s service territory. A full map of PSPS regions can be found [here](#).

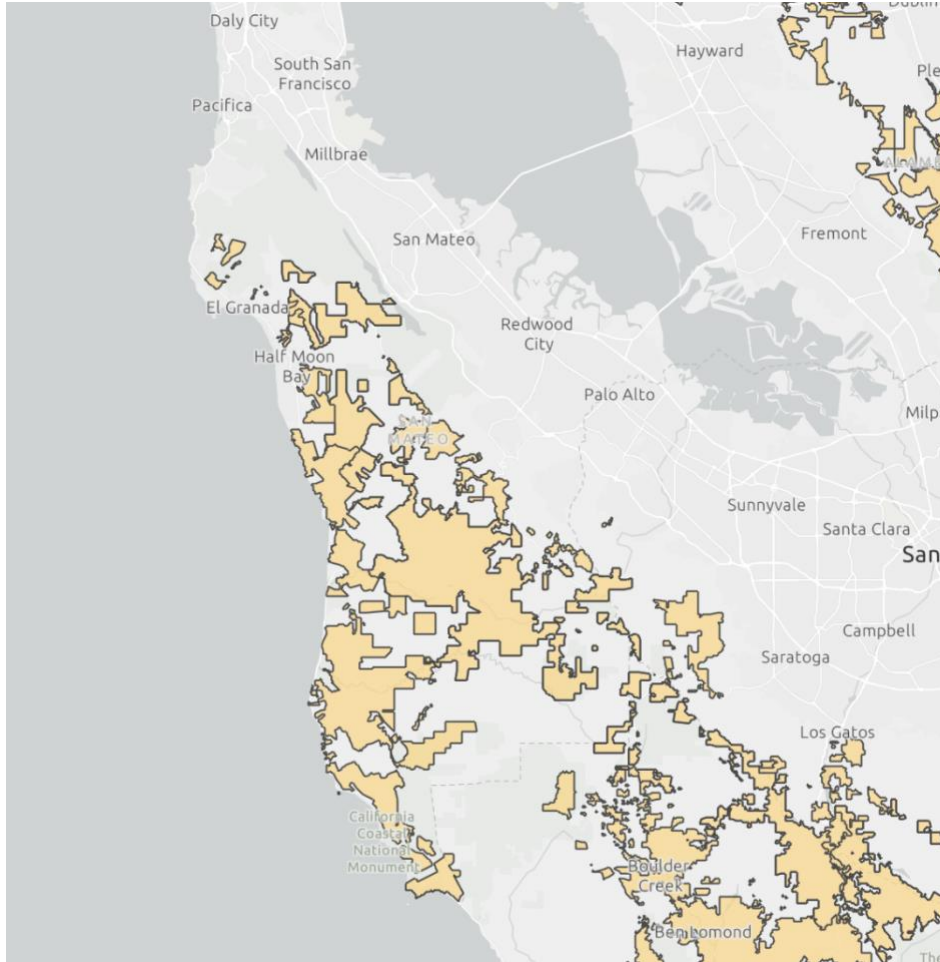


Figure 1 - Public Safety Power Shut Off (PSPS) map showing potential areas impacted by PSPS events in select areas of PCE territory.

3 RFP SCHEDULE

3.1 RFP Schedule

Event	Date
RFP released	August 28, 2023
Pre-proposal webinar (recommended but not required)	September 12, 2023 at 2pm PST
Deadline to submit questions	September 22, 2023 at 5pm PST
Answers to submitted questions are posted	September 27, 2023
Deadline to submit proposals	October 27, 2023 at 5pm PST
Notification of shortlisted proposers	November 7, 2023
Interviews	November 13-17, 2023
Tentative award selection	December 1, 2023
Contract execution	January 30, 2024

- Webinar Attendance:** [Register here](#). The webinar will provide an opportunity to ask questions. A list of webinar attendees will be publicly shared for interested parties to coordinate and team with other contractors and consultants. Webinar attendance is optional but encouraged.
- Question & Answers:** Direct all questions pertaining to this RFP to programsolicitations@peninsulacleanenergy.com with the email subject line “Questions – <Vendor Name> – Turnkey Electrification”. Questions and answers will be posted on the Peninsula Clean Energy [RFP page](#).
- Interviews with Shortlisted Proposers:** Peninsula Clean Energy will conduct interviews with Shortlisted Proposers in person at Peninsula Clean Energy’s offices in Redwood City during timeframe stated in the RFP Schedule table above.
- RFP notifications:** [Subscribe here](#) to receive RFP notifications, including any updates to this RFP and notice of when the questions & answers are posted.

4 PROPOSAL SUBMITTAL

Proposals must be received on or before the above deadline and submittal must be by email to programsolicitations@peninsulacleanenergy.com with the subject "Proposal - <Vendor Name> - Turnkey Electrification". Peninsula Clean Energy may request clarifications on submitted proposals by email or phone. Prompt responses will be requested.

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. Submit information in no smaller than size 11 font. Pay close attention to the page limit requirements. Submissions over the page limit will be considered non-responsive.

5.1 Cover Letter (1 page maximum)

Include the following elements:

1. Reference to this RFP
2. A proposal summary, including a discussion on the highlights, key features and distinguishing points of the proposal.
3. Legal business name, address, telephone number, and business status (corporation, limited partnership, individual, etc.).
4. Name of vendor’s representative with respect to this RFP along with telephone number and email address.
5. The signature of an authorized individual.

5.2 Approach (12 page maximum)

Broadly describe a proposed solution to delivering the Single-Family Service. If improvements can be made, the proposer may recommend modifications as a part of its proposed solution.

Include answers to the following questions to indicate a clear grasp of the intent of the Single-Family Service:

1. Describe how you would achieve the Scope of Work (SOW) described in “Section 12 Detailed Project Description and Scope” including:
 - a. Should the elements of the Single-Family Service (Direct Install, Cost-Share Turnkey, and Emergency Water Heater Replacements) be phased in, or launched simultaneously? If phased, how and why?
 - b. How will the Consultant provide a seamless experience for the customer, including through intake, site assessment, and experience throughout the installation process? How will the Consultant address changes to the home project scope either requested by the customer or encountered during project construction?
 - c. In what instances, if any, should low-income Direct Install customers receive partial, rather than whole-home electrification?

2. Describe how you would achieve the Objectives and Service Level Expectations (SLEs) described in the SOW in “Section 12 Detailed Project Description and Scope” including:
 - a. Are the timelines stated in the Service Level Expectations section appropriate and/or adequate? If not, how should the SLEs be modified while still providing exceptional customer service? How should permitting and inspection times tie into these timelines?
3. Describe key opportunities including:
 - a. What building characteristics lend themselves to successful electrification retrofits and why? What is the best way to transition those buildings cost-effectively and efficiently to all-electric? Please provide examples of successful electrification projects (in PCE territory, SVCE territory, or California) in which the Consultant has implemented these solutions.
4. Describe key challenges and resolutions including:
 - a. What are common challenges with transitioning single-family properties to all-electric construction? What percentage of homes do you believe will have challenges installing heat pump systems? What does the team propose is the best way to transition those homes cost-effectively and efficiently to all-electric? Please respond for both heat pump water heater and heat pump space heating and provide examples of successful electrification projects (in SVCE territory or California) in which the Consultant has implemented these solutions.
 - b. What percentage of whole-home electrification projects are projected to require a circuit controller device, such as: circuit splitters, circuit throttlers, or smart panels? How did you come up with that estimate?
 - c. Briefly describe the pros and cons of using circuit controllers vs. 120V equipment for electrification solutions.
 - d. Explain approach to securing preferential equipment pricing and prompt product availability, especially for more expensive and hard to secure equipment such as battery storage systems. Specify anticipated battery & equipment pricing and availability improvements.
5. Specify staffing, roles, and partners, including contractor firm(s) and other major parties.

5.3 Workforce (2 page maximum)

1. How will the team comply with PCE’s [Inclusive and Sustainable Workforce Policy](#) and PCE’s [Diversity, Equity, Accessibility, and Inclusion \(DEAI\) Policy](#)?
2. What can PCE and the energy industry do to ensure long-term availability of the construction workforce, specifically electricians, plumbers, HVAC technicians, and carpenters? (optional)

5.4 Proposed Project Schedule (1 page maximum)

Provide a proposed project timeline including major milestones and deliverables.

5.5 Qualifications and Experience (6 page maximum)

Include the following:

1. Relevant Experience:
 - a. Case studies - Provide a summary of three (3) examples of similar work performed, either with regards to direct install appliance replacement programs on behalf of utilities or CCAs, full retrofit electrification projects, or turnkey electrification projects.
 - b. Qualified contractor – Provide a summary of complementary energy efficiency or electrification programs (e.g., BayREN Home+, TECH Clean CA, GoGreen Financing, etc.) for which the Consultant is registered as a qualified contractor.
 - c. Additional experience (optional) – Provide a list or table of other relevant experience.
2. Number of retrofit electrification projects performed in the past: Provide a summary in table format of the number of retrofit gas-to-HPWH, gas-to-heat pump space heating, gas-to-electric dryers, and gas-to-electric or induction range projects performed in the past by members of Consultant team.
3. Qualifications and Certifications: Proposer must demonstrate compliance with all legal requirements (licenses, certifications, etc.) to install equipment as described in the Scope of Work. Provide current Contractors State License Board (CSLB) license number and name associated with CSLB license number, and other certifications and licenses.

5.6 Resumes for key staff (no page limit)

5.7 References (1 page limit)

Please provide contact information for three references related to similar projects, including: name, phone number, email, position, relevant project description.

5.8 Cost Proposal (2 page maximum)

Proposer to complete and include [Cost Table](#) (Microsoft Excel file) in proposal. Follow instructions in [Cost Table](#). Cost Table is not included in page maximum.

Please also answer the following in a narrative:

1. Describe the Proposer's pricing structure as provided in the Cost Table including:
 - a. How will the Consultant determine the appropriate cost for each measure? Please provide reasoning as to why this approach is the most efficient, cost-effective, or preferable to stakeholders. PCE is considering the following options. Proposer may also recommend alternative approaches.
 - i. Fixed Measure Cost – Consultant determines a fixed cost for program measures. For Direct Install customers, PCE pays for entire measure cost. For Cost-Share Turnkey customers, customer is presented with a fixed customer co-payment, which factors in PCE's and applicable third-party incentives.

- ii. Variable Measure Cost – Consultant performs a site assessment to determine the cost for each measure, up to a not-to-exceed amount. For Direct Install Customers, PCE pays for entire measure cost. For Cost-Share Turnkey customers, customer is presented with a co-payment, which is the Consultant’s quoted cost less PCE and applicable third-party incentives.
2. Please determine whether the Consultant believes the program size is large enough to attain a) stable and well-trained project crews and b) preferred equipment pricing on water heaters, space heaters, ranges, and dryers. If so, what means will the Consultant use to attain stable work crews and preferred pricing? Which distributor or manufacturer will the Proposer work with? What discount and warranties does the Consultant expect from bulk procurement? How does the Consultant envision prices changing over the Program term?

5.9 Contract Terms (no page limit)

Redline comments or proposed revision to PCE’s standard contract terms. See section 7.

5.10 Certificates of Insurance (no page limit)

Submit confirmation 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)

5.11 Supplier Diversity Questionnaire (Optional, no page limit)

PCE’s Supplier Diversity Questionnaire can be downloaded [here](#). 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. PCE’s Diversity, Equity, Accessibility, and Inclusion (DEIA) policy can be found [here](#).

5.12 Inclusion of Other Agencies (1 page limit)

Other not-for-profit electricity provider entities in the Bay Area are interested in offering some or all of the same services outlined in this RFP. This includes SVCE ([service area](#)) and MCE ([service area](#)) and may include others. Please answer the following:

1. What is the Consultant’s geographic service area? Do they include SVCE and MCE service areas? Please include response for all entities part of the implementation team.

2. Is the Consultant willing to extend the terms of their RFP response and resulting contract, inclusive of price, to SVCE and MCE? If not, what terms would need to change in order to serve these regions?
3. Would other areas in the Bay Area be considered as regions for extended terms and programmatic offering?

6 REVIEW AND SELECTION PROCESS

Evaluation will be based on a combination of quantitative and qualitative criteria. Peninsula Clean Energy will evaluate each proposal against the criteria described in the scoring matrix below and select a subset of proposals to move to the Shortlist phase. The most qualified proposal team 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.

The scoring matrix on the following page will be used to compare proposals. In addition, the criteria used as a guideline of evaluation will include, but not limited to, the following:

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.
2. History of successfully performing services for public and/or private agencies and
3. other CCA's.
4. History of successful home electrification projects, which may include whole-home or partial electrification.
5. Innovative approach to electrifying whole homes cost-effectively, while avoiding service upgrades where possible, and ensuring a positive and seamless customer experience.
6. Innovative approach to emergency water heater replacements.
7. Completeness of the proposed approach, including clarity of understanding of the scope of work to be provided and appropriateness of the proposed solution/services.
8. Ability to meet required timelines, demonstrate required certifications, or other requirements to fulfill the tasks identified in the scope of work.
9. Cost to Peninsula Clean Energy for the primary services described by this RFP including the cost table for program measures intended to be installed.
10. Financial viability of proposer.
11. Existence of and circumstances surrounding any claims and legal violations against the organization or key staff.
12. Ability to meet contract terms with limited revision.
13. References.

Component	Description	Max Points
Meets proposal requirements	<ul style="list-style-type: none"> • Completion of all required sections of the proposal and adhered to all page limits, included relevant attachments, and utilized provided templates where required • Proposal is well written and formatted • Acceptance of PCE's standard terms and conditions, with any exceptions stated and acceptable to PCE 	Pass /fail
Proposed Approach	<ul style="list-style-type: none"> • Demonstrates understanding of objectives and requirements • Approach addresses required program services • Approach ensures quality customer experience • Approach includes innovations or new concepts that would benefit the program 	25
Experience with electrification	<ul style="list-style-type: none"> • Number of homes proposer has fully electrified • Overall electrification project experience, specifically experience with HPWH and HP Space Heating • Experience with residential EV charging, load management and right-sizing strategies • Experience implementing emergency water heater replacements or similar programs 	20
Low-income program administration experience	<ul style="list-style-type: none"> • Experience implementing programs for low-income households and in disadvantaged communities • Number of low-income homes proposer has served 	15
Firm and staff qualifications	<ul style="list-style-type: none"> • Qualifications and experience of program administrator and proposed project staff • Qualifications and experience of installation contractors, subcontractors, and workforce • Experience with non-English (Spanish, Mandarin, Cantonese, Vietnamese) speaking households • Ability to scale services across PCE and SVCE territory 	15
Fulfills PCE's Sustainable Workforce & DEAI Policies et al.	<ul style="list-style-type: none"> • Fulfills PCE's Sustainable Workforce Policy • Fulfills PCE's DEAI Policy • Labor rates meet prevailing wage or prevailing wage equivalent requirements 	15
Costs	<ul style="list-style-type: none"> • Cost competitiveness of measure costs, labor rates and fees, including any markups and assumptions 	10
Total points		100

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.

Peninsula Clean Energy's standard contract terms are available for review here:

<https://www.peninsulacleanenergy.com/contracts/>

Relevant Contracts:

- Contract 3 NON-STANDARD Template WITH EQUIPMENT OR CONSTRUCTION May 2021
- PCE Customer Data Confidentiality Agreement Template v2019.10

These terms may be subject to change at PCE's discretion.

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 fosters sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, accessibility, and commitment to the organization's mission and the communities it serves. As part of that commitment, 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 a diverse and inclusive set of vendors and suppliers, Peninsula Clean Energy's policy requires it to:

1. Strive to use small, local and diverse businesses and provide fair compensation in the purchase of services and supplies;
2. Proactively seek services from small, local, and diverse 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 vendors and suppliers to ensure an inclusive pool of potential vendors and suppliers.

General Order 156 (GO 156) are California Public Utilities Commission (CPUC) rules that establish requirements for Community Choice Aggregators (CCAs) with gross annual California revenues exceeding \$15,000,000 to report on their utilization of majority women-owned, minority-owned, disabled veteran-owned, persons with disabilities-owned and LGBT-owned business enterprises 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. It is the policy of Peninsula Clean Energy that all businesses, including business enterprises owned and controlled by women, minorities, disabled veterans, LGBT, and persons with disabilities (herein "diverse suppliers") shall have the maximum practicable opportunity to participate in the performance of contracts.

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), lesbian, gay, bisexual, or transgender people (LGBTBE), and persons with disabilities (PDBE). 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. This policy shall not be used to exclude any qualified businesses from participating in Peninsula Clean Energy contracting opportunities.

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 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

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

Overview

Peninsula Clean Energy's (PCE) mission is to reduce greenhouse gas (GHG) emissions and reinvest in the San Mateo County and Los Banos community. The Single-Family Home Electrification Turnkey and Direct Install Service ("Single-Family Service") installs building electrification⁴ measures in single-family residences or multi-family residences with no central systems. Customers will include both residential customers receiving market-rate services and low-income customers receiving no-cost direct-install services. At PCE's discretion, some residences may receive limited energy efficiency, minor home repair, solar, and/or battery storage in addition to building electrification measures.

The Single-Family Service will include three program elements:

1. **Income-qualified direct install electrification ("Direct Install")** – This element will provide direct installation services⁵ for electrification measures to eligible low-income customers living in single-family residences. This service will build upon PCE's existing Home Upgrade program to provide whole-home and partial electrification and minor home repair at no cost to the homeowner.
2. **Cost-share turnkey electrification ("Cost-share Turnkey")** – This element will provide turnkey installation services⁶ for electrification measures to market-rate customers living in single-family residences. Wiring, circuitry, plumbing, carpentry, and other services required to enable the installation of the equipment will be included in the installation.
3. **Emergency Water Heater Replacement** - This element will provide rapid replacement of failing natural gas water heaters with a heat pump water heater under qualified conditions. If remediation is required, such as an electrical circuit, a loaner gas water heaters may be installed to ensure there is no service interruption while work proceeds through the Direct Install and Cost Share Turnkey services.

Program Goals and Objectives

1. Ensure an affordable and easily accessible option for PCE customers to electrify their homes, including for emergency replacements.
2. Provide safer, healthier, resilient, zero carbon homes with improved indoor air quality, resilience, and lower energy bills.

⁴ Defined as the replacement of methane "natural" gas equipment for space heating, domestic hot water, stove/oven, and clothes drying with efficient electric alternatives.

⁵ Direct installation means start-to-finish installation of equipment at no cost to the customer.

⁶ Turnkey installation means start-to-finish installation of equipment, which includes a co-payment contribution from the customer

3. Electrify low-income homes in PCE territory with a target of at least 650 heat pump water heaters and 650 heat pump HVAC systems in three years.
4. Establish dedicated crews of trusted, experienced installers with high quality equipment capable of whole home electrification using advanced methods to minimize the need to upgrade PG&E service lines.
5. Encourage establishment of sustainable and diverse electrification workforce.
6. Leverage all possible local, state, and federal electrification incentives to reduce PCE and/or customer's direct costs.
7. Support PCE's load-shaping needs.

Service Level Expectations (SLE)

The Single-Family Service SLEs sets minimum requirements for how a customer receives program services. The intent of the SLEs is to deliver timely, quality services and maintain high customer satisfaction. Consultant will track and aim to achieve the following SLEs:

1. Emergency replacements or loaners equipment must be installed within 48 hours of customer call including weekends and holidays.
2. For homes receiving a single electrification measure, install and energize equipment within 30 days of customer enrollment⁷, barring PG&E service upgrade delays.
3. For homes receiving whole-home electrification⁸ and/or minor home repair, install and energize all equipment within 60 days of customer enrollment, barring PG&E service upgrade delays.
4. When functioning gas-fired appliances and equipment (water heater, space heater, stovetop, clothes dryer) are electrified through the program, electric replacements must be installed, functional, and operating within 48 hours of the gas appliance(s) removal.
5. Achieve 90% satisfaction rating from customer surveys.

Consultant Tasks

1 Program Design and Set Up

1.1 Kickoff and Check-in Meetings

Consultant will develop an agenda and lead a program kickoff meeting with PCE to review program goals and objectives, budget, timeline, and administrative processes at a mutually determined date following contract execution.

⁷ Customer enrollment is determined upon receiving the customer's signed and completed Program Participation Agreement

⁸ Whole-home electrification means space heating, domestic hot water, clothes drying, and stoves/ovens are all-electric post-installation.

After the kickoff meeting, the Consultant will set up check-in meetings on a biweekly recurring schedule for the duration of the period of performance, unless more frequent meetings are necessary as determined by PCE. For check-in meetings, Consultant will work with the PCE contract administrator(s) to determine the agenda at minimum one day prior to the meeting. Meetings will focus on program progress updates, reviewing deliverables, and determining expected milestones for the next meeting.

Task 1.1 Deliverable: Meeting agendas and meeting minutes

1.2 Provide Compliance Documentation

Consultant will provide PCE with documentation of insurance, all legally required certifications, and other requirements including for all subcontractors. If any materials are renewed or subcontractors changed, updated documents must be provided at that time. Consultant will provide all subcontracts to PCE for review and approval to verify compliance with contract terms prior to execution.

Major supplementary documentation developed while delivering these services must also be provided as determined by PCE. This supplementary documentation may include executed subcontracts, technical designs, permits, photographs of installed equipment, and materials developed for PCE and Consultant use.

Task 1.2 Deliverable: Compliance documentation, including for all subcontractors

1.3 Finalize Program Design and Strategy

Consultant will assist PCE in finalizing the program strategy, plan, and design. Prior to program launch, Consultant will:

- 1.3.1 Develop a detailed project timeline prior to kickoff meeting.
- 1.3.2 Refine plan for incorporating underserved community opportunities in workforce.
- 1.3.3 Co-develop with PCE refinements to Direct Install, Cost-Share Turnkey, and Emergency Water Heater Replacement services as needed.
- 1.3.4 Finalize Eligible Measures List, which will include measures provided in Cost Table. At PCE's discretion, the Eligible Measure List may include additional measures as described in Task 7.
- 1.3.5 Determine cost-share pricing structure and operations for Cost-Share Turnkey customers.
- 1.3.6 Determine approach for procuring equipment including selecting high-quality equipment providers with strong customer ratings for selected equipment and method for securing preferential pricing and any stocking needs.
- 1.3.7 Finalize staffing plan based on final services and program rollout timing.

1.4 Develop Program Handbook

Consultant will draft a Program Handbook for use by PCE and the Consultant. The Program Handbook will describe in greater detail the design, implementation, and policies of the Single-Family Service. Consultant will submit a draft of the Program Handbook to PCE for review and approval before finalizing. Consultant will provide written revisions and update to the Program Handbook upon PCE request. The Program Handbook will include, at minimum, the following:

- 1.4.1 Customer and property eligibility requirements for Direct Install, Cost-Share Turnkey, and Emergency Replacement.
- 1.4.2 The terms and conditions for eligible customers to participate in the program.
- 1.4.3 The process for enrolling customers in the program, including customer journey, operational steps, and developing program referrals.
- 1.4.4 Eligible Measures List. For all measures, determine fixed measure costs and/or a not-to-exceed cost. For Direct-Install, define and determine not-to-exceed remediation costs.
- 1.4.5 List of all third-party programs that can be co-delivered/leveraged through the program, including measures and incentive amounts, and process for how they are applied for and accounted for through the program.
- 1.4.6 Home Assessment methodology including the following:
 1. List of criteria that would deem a project ineligible for planned services by equipment type or issue (e.g., water heaters in locations too small for a heat pump water heater, knob and tube wiring in home, electric service capacity issues, etc.)
 2. Testing and assessing procedures and required certifications, as appropriate.
- 1.4.7 Field verification standards for Eligible Measures, including handling of hazardous materials (e.g., asbestos and lead safe practices).
- 1.4.8 The process for getting building permits, including considerations that may be unique to particular jurisdictions.
- 1.4.9 The process for installing equipment, including manufacturer's and workmanship warranty documentation processes, health and safety protocols, and quality assurance.
- 1.4.10 The process for emergency replacement processing that enables a restoration of hot water within 48 hours of customer notice, and results in an electrified appliance at the end of the project.
- 1.4.11 The process for collecting customer payments for the Cost-Share Turnkey and Emergency Water Heater Replacement services, including customer invoices and payment schedule.
- 1.4.12 Dispute resolution process including details on consumer protection policies.

- 1.4.13 The process for providing Program Progress Reports (Task 1.10) and Monthly Expense Reports (Task 1.11).

Task 1.4 Deliverable: Program Handbook

1.5 Develop and Maintain Technical Design Guidelines

The Technical Design Guidelines will be used by Consultant to guide the development of each participating home's Scope of Work (Task 5.5.1).

The Technical Design Guidelines will be based on the following principles:

1. Maximizing decarbonization with high cost-effectiveness;
2. Favoring installation and operation simplicity and reliability;
3. Delivering operating cost, comfort and air quality benefits to homeowners, while mitigating adverse conditions such as noise;
4. Designing for grid benefits and resilience where possible;
5. Permitting requirements of the local jurisdictions; and
6. Avoiding service upgrades through power-efficient, whole system design whenever possible. All program contractors will be expected to be trained on this topic.

In collaboration with PCE, Consultant will develop and maintain Technical Design Guidelines. Consultant will:

- 1.5.1 Draft the Technical Design Guidelines to PCE for review and approval before finalizing. Technical Design Guidelines shall, at a minimum, include the following:
 1. Installation guidelines and diagrams, if applicable, for Eligible Measures.
 2. For Direct Install, Eligible Measures will also include minor home repair measures and, in some cases, energy efficiency and resilience measures.
 3. Installation guidelines and diagrams, if applicable, for approved New Program Measures, Technologies and Methods (Task 7).
 4. Home scenarios and a decision tree.
 5. Process and guidelines for decommissioning gas equipment, capping gas lines, and if appropriate or necessary coordination with PG&E to remove gas meter.
- 1.5.2 Monitor industry best practice through associations such as ASHRAE and other forums.
- 1.5.3 Provide written revisions and updates to the Technical Design Guidelines based on industry best practices and learnings from the Program every 12 months or as mutually deemed appropriate.
- 1.5.4 Design Technical Design Guidelines to be public-facing and consistent with PCE's Branding Guidelines.

*Task 1.5 Deliverable: Technical Design Guidelines***1.6 Develop Home Assessment Template**

Consultant will create a Home Assessment Template for PCE review and approval before use. Consultant will perform an in-home or virtual assessment and use the Home Assessment Template to document existing home conditions and equipment and determine measures' suitability to develop a customized Scope of Work (Task 5.5.1). The Home Assessment will include, at minimum, the following elements regarding equipment and appliances located at the residential property:

- 1.6.1 An inventory of physical conditions, age, and estimated remaining lifespan(s) of equipment, appliances, and home conditions.
- 1.6.2 Evaluation of the condition and capacity of the existing electrical systems and recommended upgrades that may be necessary to enable the proposed measures.
- 1.6.3 Analysis of panel capacity for recommended measures and whole-home electrification (either meter-based or electric load calculations as needed) to ensure home can electrify on service capacity and determine appropriate approach to electrical layout.
- 1.6.4 Recommended locations for new electrical equipment, noting any observed space or structural constraints and possible remedies.
- 1.6.5 Photos and diagrams (site, equipment, etc.).

*Task 1.6 Deliverable: Home Assessment Template***1.7 Develop Scope of Work Template**

In coordination with PCE, Consultant will draft a Scope of Work template for PCE review and approval before use. The Scope of Work will be provided by the Consultant to the homeowner and will include information necessary for the homeowner to understand the electrification opportunities available to them. The Scope of Work will be developed in paper and electronic formats. Consultant will provide revisions and updates to the Scope of Work template upon PCE request. The Scope of Work template shall include the following elements:

- 1.7.1 Customer contact information (name, address, email, phone number)
- 1.7.2 Program contact information (email, phone number)
- 1.7.3 Recommended Eligible Measures (measure, quantity, cost)
- 1.7.4 Incentives (PCE and third-party rebates and incentives)
- 1.7.5 Financing options (PCE and third party financing)
- 1.7.6 Cost (total and net of incentives)
- 1.7.7 Proposed workplan and timeline that will be executed if customer opts to receive services

*Task 1.7 Deliverable: Scope of Work Template***1.8 Develop Program Participation Agreement**

In coordination with PCE, the Consultant will draft a Program Participation Agreement(s) that includes terms and conditions of the program and grants the Consultant and its subcontractors permission to perform activities necessary to participate in the Program including site visits, building evaluations, equipment installation, and evaluation, measurement and verification (EM&V). The Program Participation Agreement will be developed in paper and electronic formats. The Participation Agreement shall be signed by homeowners at the time of enrollment.

*Task 1.8 Deliverable: Program Participation Agreement***1.9 Enroll in State or Local Programs**

Complementary regional, state, and federal electrification incentive programs (“third-party programs”) will be available during the program term, including but not limited to BayREN Home+, TECH Clean CA, CA Smart Energy Homes, GoGreen Financing, and the Inflation Reduction Act (IRA) electrification rebates. Maximizing third-party program incentives is necessary to reduce project costs across the Single-Family Service. Some third-party programs require enrollment as a qualified contractor to be eligible for incentives. As such:

- 1.9.1 Consultant and/or its subconsultants shall enroll in third-party programs as directed by PCE and provide PCE with proof of enrollment.
- 1.9.2 During the program term, Consultant shall complete and submit applications for third-party programs for projects completed.
- 1.9.3 Consultant shall capture incentives from third-party programs and report on funds received and net PCE costs on Monthly Expense Report.

*Task 1.9 Deliverable: Proof of enrollment in other incentive programs as directed by PCE.***1.10 Setup Customer Relationship Management (CRM) System & Data Exchange**

A customer relationship management (CRM) system is critical to manage the pipeline of projects in an easily searchable and reportable way and analyze program performance. Consultant shall:

- 1.10.1 Set up an electronic customer relationship management (CRM) for the Program.
- 1.10.2 With PCE, jointly define all the data elements to be captured. At a minimum, data elements shall include the following:
 1. Customer contact information (name, address, phone, email);
 2. Customer enrollment in Direct Install, Cost Share Turnkey, or Emergency Water Heater Replacement program element(s) and status for receiving services, including whether projects were declined by customer or infeasible with rationale;

3. Scheduled program activities, including date and time of site assessments, installations, inspections, etc.;
 4. Customer Scope of Work and resulting job orders;
 5. Photos or diagrams of site conditions prior to installation;
 6. Equipment and measures installation costs (quoted, actual);
 7. Completed customer forms and records, including Program Participation Agreement, building permits, and inspection reports;
 8. Customer payments collected;
 9. Installed equipment and measures (quantity, model, wattage);
 10. Third-party rebate and funding sources utilized (program name, incentive amount, measure).
- 1.10.3 Transfer data to PCE's Salesforce CRM. With PCE, jointly define data to be transferred and the method and frequency of the automated data transfer.
- 1.10.4 Ensure data systems meet industry-standard security and that data is encrypted, at rest and in transit.

Task 1.10 Deliverable: Customer Relationship Management system and data exchange method

2 Administrative Reporting Tasks

2.1 Develop and Provide Program Process Reports

Consultant will provide monthly Program Progress Reports. Consultant will share the report findings at the biweekly check-in meeting with the PCE contract administrator. Program Progress Reports will include at minimum: program performance towards goals and objectives, successes and challenges (e.g., technical problems, implementation barriers, or customer issues, if any), and next steps.

On a regular schedule, but no less than quarterly, review SLEs and participant surveys collected by PCE to assess performance of the program, Consultant and subcontractors, work completed, and recommend to PCE program improvements.

Task 2.1 Deliverable: Program Progress Report

2.2 Develop and Provide Monthly Expense Reports

Consultant will develop a Monthly Expense Report Template for PCE review. After PCE approval of the Monthly Expense Report Template, Consultant will provide Monthly Expense Reports including all associated invoices, including by subcontractors, by a mutually determined day of the month to receive payment for services provided for the previous month. The Expense Report Template will include at minimum the following:

- 2.2.1 Measures installed (quantity, description, model number, cost);

- 2.2.2 Administration labor (task, subtask, hours, rate, total);
- 2.2.3 Revenue from third-party rebate programs (program name, measure, total revenue);
- 2.2.4 Revenue from Cost-Share Turnkey customer co-payments;
- 2.2.5 Total expenses for the reporting period by program element (i.e., Direct Install, Cost-Share Turnkey, and Emergency Water Heater Replacement);
- 2.2.6 Total program expenses by program element; and
- 2.2.7 Remaining program budget.

Task 2. Deliverables: Monthly Expense Report Template and Ongoing Monthly Expense Reports

2.3 Develop Annual Program Report

Consultant will develop an Annual Program Report consistent with PCE Branding Guidelines for public distribution within 3 months after completion of each 12-month period. Consultant will draft the Annual Program Report for PCE review and approval prior to public distribution. The Annual Report will include at minimum the following:

- 2.3.1 Executive summary;
- 2.3.2 List of outcomes for each Program Objective;
- 2.3.3 List of any additional accomplishments;
- 2.3.4 Summary of each project including home characteristics, measures installed, completion date, project duration, funding sources, costs;
- 2.3.5 Summary of average project costs for each equipment type, and lessons learned broken down by project type;
- 2.3.6 Evaluated conclusions drawn from the project including lessons learned and recommendations for future work; and
- 2.3.7 Financial summary comparing expenditures to the project budget.

3 Marketing and Outreach

3.1 Coordinate Marketing and Outreach Activities

PCE has in-house marketing and communications professionals. PCE's Communications Team will be primarily responsible for marketing and outreach to customers via emails, mailers, digital ads, and messaging at public events and forums. Additionally, PCE will engage with community-based organizations (CBOs) partners to provide pre-qualified customer leads for the Direct Install element of the program. Consultant will:

- 3.1.1 Work closely with PCE staff to ensure alignment with existing marketing and communications practices, including but not limited to branding guidelines and writing styles.
- 3.1.2 Participate in regular meetings (anticipated as quarterly) with PCE's Communications Team to discuss marketing approach, program progress, and marketing needs.
- 3.1.3 As needed, propose additional materials needed for the program and co-develop webpages, flyers, enrollment forms, educational forms, and other program materials with PCE's Communications Team.
- 3.1.4 Assist in the development of an outreach strategy that targets homes that are most likely to benefit from the services based on electric and gas meter data, building characteristics, demographics and other criteria as mutually determined.

3.2 Develop Case Studies

Consultant will produce two to four case studies per year (2-4 pages each) throughout the program period. The case studies are intended for public distribution and will highlight successes, challenges, costs, and best practices with transition to all-electric construction.

Task 3.2 Deliverable: Case Studies

4 Direct Install Implementation

4.1 Screen, Enroll, and Educate Customers

Consultant will:

- 4.1.1 Intake customer leads via online interest form hosted on PCE's website. Form will allow customer to specify preferred communication method (phone, text, email).
- 4.1.2 Screen customer leads based on Program Handbook (Task 1.4).
- 4.1.3 Respond to customers by their preferred communication channel within three (3) business days to enroll them in the program, which includes collecting eligibility verification documentation, such as income documentation, and scheduling a Home Assessment (Task 4.2).
- 4.1.4 Manage all customer communications in both English and Spanish by project staff. As needed, offer access to interpretation service for other priority languages (e.g., Mandarin, Cantonese, and Tagalog).
- 4.1.5 Provide customer with educational materials on home electrification and on use and maintenance of equipment to be installed in customer's homes.
- 4.1.6 Where appropriate, refer customers to other non-electrification programs, such as energy efficiency and home repair programs that customers may qualify for.

4.2 Perform Home Assessment, Develop Customer Scope of Work, and Execute Program Participation Agreement

After completing Task 4.1 with the customer, Consultant will:

- 4.2.1 Serve as the enrolled customer's principal point of contact for the Program, provide ongoing support, and resolve any customer issues.
- 4.2.2 Perform an in-person or virtual Home Assessment in eligible customer's homes and update CRM (Task 1.10).
 1. If an electrification plan was previously produced for the customer by PCE or a third-party, the electrification plan may be used as initial guidance for the Home Assessment but should be adapted as conditions and professional evaluation dictate.
- 4.2.3 Using data gathered from the Home Assessment, develop a proposed Scope of Work that is consistent with the Technical Design Guidelines (Task 1.5).
 2. If within Program budget, whole home electrification scope is to be encouraged with the property owner. Property owner may decline measures, but at least one major electrification measure (i.e., water heater or space heating and cooling) is required to receive services.
- 4.2.4 Deliver Scope of Work to customer. Consultant will offer to review the Scope of Work with customer by phone to explain findings, address any questions, and begin planning any installations.
- 4.2.5 Provide an unsigned version of the Program Participation Agreement (Task 1.8) to customer for their signature.

4.3 Install Measures and Provide Post-Installation Quality Control

Upon receiving the customer's signed Program Participation Agreement, the Consultant will:

- 4.3.1 Apply for building permits on behalf of the customer.
- 4.3.2 Oversee installation and manage subcontractors, if any, installing measures outlined in the Scope of Work (Task 1.7)
 3. All equipment must be installed in accordance with all applicable federal, state, and local laws, building codes, manufacturer's specifications and permitting requirements.
 4. Consultant will notify PCE of any delays which may result in an installation start date later than 120 days from the customer's signed Program Participation Agreement.
- 4.3.3 Periodically, as mutually determined with PCE, perform quality control procedures to evaluate subcontractors' performance and implement changes as mutually deemed appropriate.

1. Where an inspection has been provided by the local Authority Having Jurisdiction (AHJ,) provide inspection report, which will be used as quality control for that installation. Consultant shall perform site visits in 5-10% of homes that didn't have an inspection report and provide reports to PCE on quarterly basis.
 2. Additionally, PCE may request site visits of up to 10 homes receiving services. Consultant shall participate in project site visits with the designated PCE staff member(s) at a mutually determined date.
- 4.3.4 Within ten (10) business days of installation, educate customer in successfully operating and maintaining the new measure(s) installed.
 - 4.3.5 Provide customer with equipment technical manuals, equipment warranty documentation, installation warranty documentation both electronically and in a three-ring binder.
 - 4.3.6 Respond to workmanship warranty calls as needed and assist customer in responding to product warranty issues. Address all workmanship and product replacement warranty issues to reasonable customer satisfaction.

4.4 Manage Program Funds and Third-Party Rebates

After completing the customer's installation, Consultant will:

- 4.4.1 Submit application(s) for third-party program(s) the project is eligible for to reduce project costs.
- 4.4.2 Pay invoices for equipment, installation, and subcontractor services.
- 4.4.3 Provide Monthly Expense Reports (Task 2.2) to receive payment for Program services.

4.5 Provide Supporting Documentation for Completed Projects

Proper record-keeping is critical for the success of the Single-Family Service. As such, Consultant must timely and accurately make the following items available for each project in Consultant's CRM in order to receive payment for Services under this Agreement:

- 4.5.1 Customers' Scope of Work;
- 4.5.2 Photos, Permits, and Final Inspection Report;
- 4.5.3 Executed Program Participation Agreement;
- 4.5.4 Project Installation Data

5 Cost-Share Turnkey Implementation

5.1 Screen, Enroll, and Educate Customers

Consultant will:

- 5.1.1 Intake customers leads via online interest form hosted on PCE's website. Form will allow customer to specify preferred communication method (phone, text, email).
- 5.1.2 Screen customer leads based on Program Handbook (Task 1.4).
- 5.1.3 Respond to customers by their preferred communication channel within three (3) business days to enroll them in the program, which includes collecting eligibility verification documentation, if any, and scheduling a Home Assessment (Task 4.2).
- 5.1.4 Manage all customer communications in both English and Spanish by project staff. As needed, offer access to interpretation service for other priority languages (e.g., Mandarin and Cantonese, Tagalog).
- 5.1.5 Provide customer with educational materials on home electrification and on use and maintenance of equipment to be installed in customer's homes.

5.2 Perform Home Assessment, Develop Customer Scope of Work, and Execute Program Participation Agreement

After completing Task 5.1 with the customer, Consultant will:

- 5.2.1 Serve as the customer's principal point of contact for the Program, provide ongoing support, and resolve any customer issues.
- 5.2.2 Perform an in-person or virtual Home Assessment in eligible customer's homes and update the CRM (Task 1.10)
 - 1. If an electrification plan was previously produced for the customer by PCE or a third-party, the electrification plan may be used as initial guidance for the Home Assessment but should be adapted as conditions and professional evaluation dictate.
- 5.2.3 Using data gathered from the Home Assessment, develop a proposed Scope of Work (Task 1.7 that is consistent with the Technical Design Guidelines (Task 1.5).
 - 1. If within Program budget, whole home electrification scope is to be encouraged with the property owner. Property owner may decline elements but at least one major electrification measure (i.e., water heater or space heating and cooling) is required to receive Program services.
- 5.2.4 Deliver Scope of Work (Task 1.7) to customer which includes pricing of services, and information on all relevant rebates and financing options. Consultant will offer to review the Scope of Work by phone to explain findings, address any questions, and begin planning any installations.
- 5.2.5 Provide an unsigned version of the Program Participation Agreement (Task 1.8) to customer for their signature.

5.3 Install Measures and Provide Post-Installation Quality Control

Upon receiving the customer's signed Program Participation Agreement, the Consultant will:

- 5.3.1 Apply for building permits on behalf of the customer.

- 5.3.2 Oversee installation and manage subcontractors, if any, installing measures outlined in the Scope of Work.
1. All equipment must be installed in accordance with all applicable federal, state, and local laws, building codes, manufacturer's specifications and permitting requirements.
 2. If electrical service capacity upgrade is required, coordinate with PG&E on service and panel upgrades.
 3. Consultant will notify PCE of any delays which may result in an installation start date later than 120 days from the customer's signed Program Participation Agreement
- 5.3.3 Periodically, as mutually determined with PCE, perform quality control procedures to evaluate subcontractors' performance and implement changes as mutually deemed appropriate.
1. Where an inspection has been provided by the local Authority Having Jurisdiction (AHJ,) provide inspection report, which will be used as quality control for that installation. Consultant shall perform site visits in 5-10% of homes that didn't have an inspection report and provide reports to PCE on quarterly basis.
 2. Additionally, PCE may request site visits of up to 10 homes receiving services. Consultant shall participate in project site visits with the designated PCE staff member(s) at a mutually determined date.
- 5.3.4 Within ten (10) business days of installation, educate customer in successfully operating and maintaining the new measure(s) installed.
- 5.3.5 Provide customer with equipment technical manuals, equipment warranty documentation, installation warranty documentation both electronically and in a three-ring binder.
- 5.3.6 Respond to workmanship warranty calls as needed and assist customer in responding to product warranty issues. Address all workmanship and product replacement warranty issues to reasonable customer satisfaction.

5.4 Manage Program Funds, Third-Party Rebates, and Customer Payments

After completing the customer's installation, the Consultant will:

- 5.4.1 Collect customer cost-share payments. Cost-Share Turnkey projects shall be paid by the customer and PCE. Customers will have a co-payment contribution (either based on a fixed cost per measure or an actual cost basis) after applicable incentives are applied. Consultant shall be responsible for collecting customer co-payments, receiving third-party rebates, and invoicing PCE for measure costs.
- 5.4.2 Submit application(s) for third-party program(s) the project is eligible for to reduce project costs. Where feasible, third-party program incentives shall be captured by Consultant and reduce the cost of the customer's co-payment contribution.
- 5.4.3 Submit documentation to PCE on third-party rebate and incentive sources such as amount captured per month and net PCE cost after third-party rebates.
- 5.4.4 Pay invoices for equipment, installation, and subcontractor services.

- 5.4.5 Provide Monthly Expense Reports (Task 2.2) to receive payment for Program services.

5.5 Provide Supporting Documentation for Completed Projects

Proper record-keeping is critical for the success of the Single-Family Service. As such, Consultant must timely and accurately make the following items available for each project in Consultant's CRM in order to receive payment for Services under this Agreement:

- 5.5.1 Customers' Scope of Work;
- 5.5.2 Photos, Permits, and Final Inspection Report;
- 5.5.3 Executed Program Participation Agreement;
- 5.5.4 Project Installation Data

6 Emergency Water Heater Replacement Implementation Tasks

Most water heater replacements are performed after the equipment has failed, and customers expect access to hot water within 1 to 3 days of failure. The Emergency Water Heater Replacement element of the Single-Family Service will be available to both Direct Install and Cost-Share Turnkey participants. When a gas water heater fails, there are three common emergency replacement scenarios:

1. **On-Site Electrification** – This scenario allows for immediate installation of a heat pump water heater on the day of the site visit.
2. **Gas Loaner Electrification** - Electrification is not feasible on the day of the site visit, typically due to the need to coordinate with an electrician. In this scenario, PCE envisions an installation of a temporary gas loaner unit while electrical services are coordinated.
3. **Infeasible** - Electrification is infeasible at the site due to criteria developed in Technical Design Guidelines (e.g., physical constraints, constrained PG&E service line, or other factors).

The following approach is one way to create an emergency replacement program, however, PCE invites Proposers to propose the most effective approach.

6.1 Coordinate Emergency Water Heater Replacement Services

Consultant will:

- 6.1.1 Provide a dedicated phone number (i.e., hotline) with dedicated PCE branded messaging for customers to call and schedule emergency water heater replacements. The hotline will be managed by Consultant 7 days a week from 8 AM – 6 PM including holidays.
- 6.1.2 When customers call the hotline, Consultant will immediately perform an over-the-phone initial screening to determine if an emergency replacement is feasible. If feasible, Consultant will schedule site visit.

- 6.1.3 Perform in-person site visit within 24 hours of customer call to determine the emergency replacement scenario and applicable approaches (Tasks 6.2, 6.3, and 6.4)
- 6.1.4 Provide and manage a minimum of ten gas water heaters for the “loaner” equipment.

6.2 Install Heat Pump Water Heater for On-Site Electrification Scenario

If Consultant determines it is feasible to install a heat pump water heater on the day of the customer site visit, Consultant will:

- 6.2.1 Select equipment sizing, model, and configure in accordance with Technical Design Guidelines (Task 1.5)
- 6.2.2 Perform electric load calculations or other assessments as needed.
- 6.2.3 Propose a Scope of Work (Task 5.5.1) for the heat pump water heater including pricing services with information on all relevant third-party program rebates and financing options.
- 6.2.4 Coordinate installation of system within 48 hours of customer call.
- 6.2.5 Install heat pump water heater in accordance with all applicable federal, state, and local laws, building codes, manufacturer’s specifications and permitting requirements.
- 6.2.6 Apply for building permit and coordinate with the AHJ to obtain final inspections and complete job closure paperwork.
- 6.2.7 Within ten (10) business days of installation, educate customer in successfully operating and maintaining the new measure(s) installed.
- 6.2.8 Provide customer with equipment technical manuals, equipment warranty documentation, installation warranty documentation both electronically and in a three-ring binder.
- 6.2.9 Respond to workmanship warranty calls as needed and assist customer in responding to product warranty issues. Address all workmanship and product replacement warranty issues to reasonable customer satisfaction.
- 6.2.10 Offer Customers the Direct Install or Cost-Share Turnkey Services (Tasks 4 and 5), as applicable.

6.3 Install Loaner Gas Water Heater for Gas Loaner Electrification Scenario

If Consultant determines it is feasible to install heat pump water heater after additional upgrades to the home are made, Consultant will:

- 6.3.1 Install a temporary gas water heating “loaner” equipment.

- 6.3.2 Invoice Cost-Share Turnkey customer for emergency loaner deposit. The deposit will be put towards the cost of the heat pump water heater installation. In the rare event that the heat pump water heater installation does not move forward, the deposit will cover the labor cost of installing loaner. Direct Install customers will not need to pay a deposit.
- 6.3.3 If heat pump water heater installation does not move forward, Consultant will:
1. Keep emergency loaner deposit for Cost-Share Turnkey customer.
 2. Remove gas water heating loaner equipment and return to loaner stock.
 3. May provide estimate and coordinate with customer on installation of replacement equipment as a service outside the scope of this Program.
- 6.3.4 Within 6 weeks of loaner installation, create and provide to customer a Scope of Work (Task 5.5.1) for heat pump water heater installation.
- 6.3.5 Coordinate heat pump water heater installation as specified in Task 6.2. Remove gas water heating loaner equipment and return to loaner stock.
- 6.3.6 Offer Customers the Direct Install or Cost-Share Turnkey Services (Tasks 4 and 5), as applicable.

6.4 Referral for Infeasible Scenario

If Consultant determines it is infeasible to install a heat pump water heater, Consultant will:

- 6.4.1 Provide information to resident, including reason why installation of heat pump water heater is infeasible.
- 6.4.2 If there is a local code requirement, complete future, PCE-developed worksheet recording that site was considered infeasible for electrification and provide to customer as required.
- 6.4.3 Provide a referral to a qualified installer for a replacement gas unit. If Consultant is able to install a replacement gas unit, Consultant may offer this service outside the scope of this Program.

7 New Program Measures, Technologies, and Methods

A goal of the Program is to fully decarbonize homes and transportation in PCE service territory while providing exceptional customer experience at the lowest installation cost. To that end, Consultant will propose new energy and electrification measures, technologies and methods for inclusion in the Program.

7.1 Energy Efficiency

- 7.1.1 Develop with PCE, criteria and program delivery methods for deploying low-cost energy efficiency measures such as: air sealing, targeted insulation, duct sealing, sink aerators, LED lights, etc.

- 7.1.2 Non-electrification, energy efficiency measures should be limited to specific homes and circumstances where they increase effectiveness of electrification equipment, decrease cost of electrification installation, or significantly improve bill savings opportunity.

7.2 EV Charging

- 7.2.1 Develop methods to ensure homes are EV ready with at least a 20-amp, 120 volt outlet on a dedicated circuit unless technically infeasible, such as lack of off-street parking.

7.3 Solar and Storage

- 7.3.1 Develop with PCE, criteria and program delivery methods for deploying solar-only and solar and storage systems where deemed appropriate with the intention of incorporating this element in the second year of the program.
- 7.3.2 Approaches to program delivery may include directly subcontracting with qualified solar and storage installers and/or recommending that PCE directly contract with such providers.
- 7.3.3 Solar and storage systems are anticipated to be financed through lease or power-purchase agreements unless customers opt for direct purchase (in the Cost-Share Turnkey service). However, PCE may elect at its discretion to pursue its own financing structures.

7.4 120 Volt Systems and Space + Water Heating Combo Systems

- 7.4.1 Monitor results of assessments for 120-volt water heater, space heating systems, and induction ranges.
- 7.4.2 Develop with PCE criteria and program delivery methods for deploying these systems as lower cost alternatives to traditional 240-volt systems under conditions that satisfy resident comfort needs.

7.5 Energy Resilience

- 7.5.1 Develop with PCE criteria and program delivery methods for deploying low-cost methods relevant across PCE climate zones for addressing heat wave and power outage measures which may include:
 1. Heat Wave: Ceiling fans, evaporative cooling, awnings/shading, window tints, etc.
 2. Power outages: oversized water heater tanks, battery enabled appliances, portable batteries and uninterruptable power supplies, etc.

7.6 Virtual Power Plant

- 7.6.1 Develop with PCE criteria and program delivery methods for deploying load shaping technologies such as smart thermostats and water heaters with the intention of incorporating this element on a mutually determined schedule.
- 7.6.2 Develop with PCE methods for aggregating grid-enabled systems into dispatchable “VPP” groups on a mutually determined schedule.
- 7.6.3 Incorporate storage systems into the VPP systems.

7.7 Panels and Service Capacity

- 7.7.1 To keep costs down, PCE seeks an approach that avoids service upgrades where possible. Identify or develop tool or process for National Electrical Code (NEC) 220.83 and/or 220.87 calculations which will assist with upgrading homes without requiring a PG&E service upgrade.
- 7.7.2 Develop criteria for a) service upgrades or b) panel replacements without service upgrades such as due to safety needs.
- 7.7.3 Work with PCE to assess scenarios where smart panels, smart breakers, and circuit pausers may be useful and cost-effective.

7.8 Innovations

- 7.8.1 Pilot technologies as mutually determined to meet program objectives including not only technologies mentioned above but circuit splitters, circuit pausers, smart panels, and other technologies as mutually determined.
- 7.8.2 Incorporate innovations deemed successful into Technical Design Guidelines and standard practices as mutually determined.