

REQUEST FOR PROPOSAL

Database Development and Implementation

RFP 20-609



Redwood Coast Energy Authority

October 16, 2020

Responses to RFP due by 2:00 pm PST on
Friday, November 6, 2020 via e-mail to:

pterry@redwoodenergy.org

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1. BACKGROUND

Redwood Coast Energy Authority (RCEA) is a Joint Powers Agency whose members include local governments in Humboldt County. Since 2017, RCEA has also been a Community Choice Aggregator (CCA) serving customers in Humboldt County. The purpose of the Redwood Coast Energy Authority is to develop and implement sustainable energy initiatives that reduce energy demand, increase energy efficiency, and advance the use of clean, efficient, and renewable resources available in the region.

RCEA has been an implementer of energy efficiency programs in Humboldt County since 2003. Our current Demand Side Management (DSM) programs include a non-resource Local Government Partnership with Pacific Gas & Electric Company (PG&E) and several customer programs funded by the CCA. In May of 2020, RCEA also elected to become a Program Administrator for two ratepayer-funded Energy Efficiency Resource Programs. RCEA will administer programs serving over 55,000 customers in Humboldt County.

DESCRIPTION OF DSM PROGRAMS

RCEA has many programs already launched and in development that will be tracked with the database. RCEA acts as the local clearinghouse for energy programs and the intent is to reduce confusion to customers and act as the single point of contact for Humboldt County's energy needs. The services will be presented under the banner of Customer Energy Solutions and includes the suite of offerings described below. The funding sources and reporting requirements vary, creating a challenge when providing services across multiple programs.

CPUC ENERGY EFFICIENCY PROGRAM ADMINISTRATOR

RCEA used the elect-to-administer pathway to become a Program Administrator for Energy Efficiency programs using California Public Utilities Commission (CPUC) ratepayer funds. There are two programs, Non-Residential and Residential, that are primarily direct install and downstream rebate programs. Reporting is done to the CPUC through their CEDARs portal (cedars.sound-data.com). This program has been operational since July 1, 2020 but is not yet offering services to the public. Services are expected to launch later this fall. The program ends on June 30, 2023.

PG&E LOCAL GOVERNMENT PARTNERSHIP (LGP)

Through PG&E's LGP non-resource program, RCEA assists Public Agencies and Hard-to-Reach (HTR) ratepayers with energy services including assessments, reports, long term road maps, benchmarking, and project and financing assistance. Reporting is submitted to PG&E. This program has been operational since July 1, 2020 and is currently offering limited services to public agencies with a target to launch services to all customers this fall. The program ends on June 30, 2023.

LOCALLY FUNDED PROGRAMS

The database will initially primarily provide support for the externally funded programs listed above and will in the near term provide also track services provided through the following locally funded programs offered under the CCA. Below is a list of existing locally funded programs that are already operational:

- Public Agency Solar Program
- Residential Energy Advisor Programs
- Residential Energy Efficiency Kits
- Management of large Key Accounts

RCEA also has several programs in the development phase that will likely launch in 2021 and will require additional database modifications to support tracking and reporting:

- Mobile Home Solar
- EV and charging station rebates
- Fuel Substitution Heat Pump Rebates
- Green Your Grow
- Grocery Refrigeration

2. OBJECTIVE

In order to optimize services to the community, RCEA requires a single database solution to:

- Track customer interactions;
- enable data driven marketing;
- Manage projects and programs;
- Access customer data;
- Support reporting.

Respondents will provide proposals for the development and implementation of a database solution as described below. Respondents to this RFP must have been qualified for participation under the Request for Qualifications 20-608.

3. SCOPE OF SERVICES

OVERVIEW

The project overview in RFQ 20-608 summarizes the existing database solutions in use by RCEA and the desired use cases. A detailed list of desired user functions and data requirements is provided in the Appendix A of this RFP.

RCEA is seeking to enter into a 3-year agreement with a single entity who will provide comprehensive services to develop, launch and support a database solution for Demand Side Management programs to meet the needs described in the attached tables.

SERVICES SOUGHT/SCOPE OF SERVICES

Specific services desired are outlined in the Scope of Services below, but this RFP is not intended to require a particular implementation approach and will consider different service models and strategies. Proposals should include additional and relevant services not specifically requested in this RFP if appropriate. Proposers are encouraged to provide cost-effective or beneficial alternatives.

The Scope of Services is intended to provide a framework for RFP responses, but the final Scope of Work included in the Professional Services Agreement may be modified and re-defined with the selected Proposer. Proposals may expand, modify, or restructure the tasks. If the task structure below is not followed, proposers should make clear in their proposals how the activities below are being addressed and how alternative activities proposed will enhance the delivery of the database solution.

PHASE 1 DEVELOPMENT

Task 1.1 Kickoff Meeting - RCEA and the selected proposer will meet after the contract is executed to kick-off services. RCEA and the Proposer will introduce their core database team. RCEA will provide details about the programs to be served by the database and answer any additional questions about the needs of the database. The proposer will answer any additional questions about the database. The schedule, next steps and milestones will be discussed.

Task 1.2 Needs Assessment Expansion - The proposer will use the data collected by RCEA on the database needs and expand the assessment where needed to produce the database specifications.

Interviews may be conducted with RCEA staff such as program managers, database users and potential customers. The data from the initial needs' assessment has been included in Appendix A and includes data needs and user needs.

Task 1.3 Discovery - The proposer will gather all information needed for the development of the database. The deliverables for this task will be documentation of solutions to address the need and wants from the expanded Needs Assessment.

Task 1.4 Project Plan - After the needs assessment and discovery phase are complete, the proposer will discuss a project plan with the RCEA database team. The specifications for the proposed database will be presented. Any adjustments to the schedule and milestones will be captured in an updated Scope of Work (SOW) before proceeding into implementation.

PHASE 2 IMPLEMENTATION

Task 2.1 Tool Development or Configuration of Existing Tool - The proposer will begin initial buildout of the database or configuring an existing database to meet the needs of the RCEA.

Task 2.2 Implementation Sprints (Design, Build, Test, Review, Launch) - RCEA and the proposer will meet regularly before implementation sprints and adjust the schedule and milestones as needed.

Task 2.3 Data migration - Data will be migrated from existing databases into the new database. The Proposer will work with RCEA on what fields are critical to be imported and any data manipulation required to migrate the tables.

Task 2.4 Finalize Configuration - The proposer will fine tune the database, dashboards, queries, reports, and other processes to meet RCEA's needs.

Task 2.5 Acceptance Testing - RCEA database administrators will begin testing the database to confirm system performance.

PHASE 3 LAUNCH

Task 3.1 Training - The proposer will provide training and user manuals for the database. Training will be provided to all database users before being granted access to the database.

Task 3.2 Stabilization - There will be a stabilization period where any errors identified can be rectified and users can confirm that the database meets the needs as agreed upon. The proposer will identify a method for these items to be communicated and resolved. RCEA and the proposer will also meet frequently during this period of stabilization.

Task 3.3 Finalize Product - Once the stabilization period is complete and all modifications have been accepted, and the database has shown to meet the needs of RCEA including those described in Appendix A, the product will be finalized with the RCEA database administrators. The final product will be considered complete but RCEA reserves the right to request additional program modules as needed during the ongoing support phase.

PHASE 4 ONGOING SUPPORT

Task 4.1 Technical support - The proposer will provide continued technical support for the database.

Task 4.2 Adding Program Modules - As new programs come on-line, RCEA may request the addition of new program modules that require database modification.

PHASE 5 PROGRAM CLOSEOUT

At the end of the 3-year program cycle for the externally funded programs, RCEA expects the need to export and archive data from the program. RCEA also expects there will be data required for export for final program reporting. This phase will become more defined towards the close of the program cycles. The base contract end date will be at least 6 months beyond the end of the programs, for the proposer to provide continued support through the program closeout period.

SECURITY REQUIREMENTS

RCEA works with utility data and personally identifiable information as a core business function and complies with all state and national standards regarding data security and consumer privacy. All proposed products and services developed and conducted on behalf of RCEA shall meet or exceed corresponding data security and privacy compliance requirements of the agency. Security protection protocols shall be at least as protective as ISO-27000 series, NIST SP 800-53, or SOC Type.

Vendor shall document their data security and privacy compliance and identify and demonstrate that any third parties working directly or indirectly with RCEA data are certified to the same or better level of protection.

Vendors shall agree that they are subject to scheduled and random data security and privacy compliance audits, and to work with RCEA to resolve identified mitigation steps.

DESIRED TIMELINE

The chart below shows the desired timeline for execution of each phase from the Scope of Work. The eternally funded programs launched in July of this year have contract end dates in June 2023. Ideally there would be a working product by mid-2021 and the programs would be supported for 2 full years by the database.

	20	2021												2022												2023													
	D	J	F	M	A	M	J	J	A	S	O	N	D	D	J	F	M	A	M	J	J	A	S	O	N	D	D	J	F	M	A	M	J	J	A	S	O	N	D
Phase 1																																							
Phase 2																																							
Phase 3																																							
Phase 4																																							
Phase 5																																							

SUPPLY CHAIN DIVERSITY

Respondents that are women, minority, LGBT, and disabled veteran-owned businesses are encouraged to join the CPUC's Supplier Diversity Clearinghouse Program <http://www.thesupplierclearinghouse.com/>. This is voluntary and will not be used as a criterion for evaluation.

4. PROPOSAL PROCESS

4.1 SCHEDULE

RFP Process	October 16 – November 19, 2020
RFP Released	October 16, 2020
Deadline to Submit Questions and RFIs	October 23, 2020 by 12:00 pm PST
Distribution of Answers and Clarification	October 27, 2020 by 5:00 pm PST
Proposals Due	2:00 PM PST, Friday, November 6, 2020
Interviews/Product Demonstrations	November 9 – November 12, 2020
Anticipated Notice of Recommendation for preferred proposal	November 12, 2020
RFP Award Date by RCEA Board	November 19, 2020
Anticipated Contract approval and start date	December 1, 2020

Any changes to the schedule above will be issued as an addendum to the Request for Proposals.

4.2 QUESTIONS AND REQUESTS FOR INFORMATION (RFI)

RCEA requires Proposers to submit all questions and requests for information (RFIs) in writing via e-mail to pterry@redwoodenergy.org. The deadline for submitting written questions and RFIs will be Friday, October 23rd by 12:00 pm PST. Questions submitted after this time may not receive a response. All questions and RFIs will be answered in writing and distributed to all proposers qualified through RFQ 20-608 by the anticipated date of October 27, 2020 at 5:00 pm PST.

4.3 CORRESPONDENCE

Proposers shall submit all correspondence, questions, and the proposal to the following contact individual:

Patricia Terry, Senior Project Manager
E-mail: pterry@redwoodenergy.org
Cell Phone: 707-382-2098

RCEA's office remains closed to the public with the majority of staff working from home. Messages left on the office phone number or staff voicemails may not be returned in a timely manner. Any correspondence by mail will experience delays and should not be used for proposal submission. Only e-mailed proposals will be accepted. RCEA recommends submitting proposals by e-mail before the deadline time, as server delays may lead to late responses.

5. SUBMISSION REQUIREMENTS

Each proposal submitted to RCEA shall be in accordance with the following instructions and requirements:

1. Each SOQ shall be submitted to the Redwood Coast Energy Authority by e-mail:
To: pterry@redwoodenergy.org
CC: mbithell@redwoodenergy.org
Subject Line: RFP 20-609
2. Only e-mailed submissions will be accepted. We strongly recommend e-mailing submissions before the deadline time, as server delays may lead to late responses.
3. Each SOQ must include the following sections:
 1. **Cover Letter**
 - a. Name of Proposer and primary contact person
 - b. Address, Telephone number and E-mail Address
 - c. Name of entity that would be the prime contractor and sign the agreement
 - d. Entity's legal form
 - e. Statement that requirements in this RFP and any addenda have been reviewed
 - f. Signature by an authorized signed of the proposing firm
 2. **Executive Summary**

Provide a concise summary of your proposed product, experience, and services.
 3. **Core Competency and Qualifications**

Only proposers qualified through RFQ 20-608 can respond to this RFP. The following sections may have already been addressed in the Statement of Qualifications submitted in response to RFQ 20-608. Proposers must answer the following sections and may duplicate responses from their Statement of Qualifications. The proposal submitted to this RFP will be submitted to the review committee as a stand-alone document.

- a. **Experience:** Please describe your experience with the following:
 - i. Performing a database needs' assessment;
 - ii. Integrating old tools (databases and spreadsheets) into new database solutions;
 - iii. Training and/or producing training materials and manuals;
 - iv. Specific experience with working with the Energy Sector including work with: local government, utilities, state and national regulatory bodies, particularly with CA regulatory agencies if applicable.
- b. **Scope of Services:** The Scope of Work described above may be adjusted and built upon. The modified Scope of Work should be included in the proposal. The proposer should be clear about what is included in the initial buildout and whether the needs in Appendix A are included and which of the desired "wants" will also be included.
- c. **Service Methodology:** Describe your approach to development and implementation of database solutions. Please address:
 - i. Proposed implementation plan:
 1. schedule and milestones;
 2. Key Deliverables for each stage of implementation;
 - ii. Data migration strategies;
 - iii. Quality assurance processes;
 - iv. Backup methods (where would the data be hosted and where would the backups be);
 - v. Number of user accounts/licenses that the base buildout with support and what would be required to add additional users;
 - vi. If applicable, details about a Learning/Staging Site;
 - vii. Technical support:
 1. Availability;
 2. Response time;
 3. Technical support system (i.e. Ticket system);
 - viii. Customer/Vendor facing interfaces for form submissions;
 - ix. Data security and compliance with organizational policies;
 - x. Training methods (What and how much training is included in the base costs).
- d. **Product Examples:** Describe any databases currently developed by your firm or in development that may be relevant to the uses described in this RFP. *Qualified respondents will be invited to schedule a demonstration of their products for the review team.*

4. Qualifications:

- a. Resumes
- b. References for similar work
- c. Applicable certificates and licenses

5. Cost Proposal: Provide a cost proposal detailing the full cost of the services proposed and how those fees are structured. For the purposes of determining accurate fees, assume that RCEA will have 5 program managers/administrators and 20 non-administrator staff members. Provide a schedule of the following fees:

- **Labor:** Hourly rates by title or classification. Include reference to annual escalation rates, if applicable.
- **Product Access:** Fee per month or year.

- **User licenses:** Fee per user per month. Distinguish between different prices for different tiers or types of users, when applicable.
- **Configuration/ Set-up:** Any one-time or milestone fees during Phase 1,2 or 3.
- **Miscellaneous:** Fee associated with:
 - Online customer forms
 - Technical support cost structure
 - Any other service or product not captured in the categories above (fee per item or monthly fee)

In addition to the schedule of fees described above, provide estimated costs for the following items. Costs should be broken down into specific itemized budgets by phase:

- Estimated total cost of Phases 1-3 services, combined
- Estimated cost of two consecutive years of Phase 4 services

Because RCEA anticipates different proposed solutions addressing the referenced “needs and wants” in different manners, strict budget parameters are not provided in this RFP. For reference on scaling the budget of the proposed solutions, RCEA’s total budget for externally funded DSM programs totals \$840,317 per fiscal year from 2020-2023. Additional funding is approved by the RCEA Board of Directors for CCA-funded programs. Proposals will be scored on the appropriateness of cost to the proposed solution as well as the overall cost, including needs assessment, development, implementation, training, and ongoing support.

6. Anti-Collusion Statement

A sworn anti-collusion statement is included as Appendix B to this RFP and must be included as part of the proposal package. This certification is required as evidence if collusion or bid rigging is discovered at a later date. Collusion or bid rigging is grounds for cancellation of any contract that arises from this RFP as well as legal action by RCEA. Anyone with knowledge of possible bid rigging, collusion, or other fraudulent activities should report these activities to RCEA and/or the Department of Justice Antitrust Division’s Citizen Complaint Center at 1-888-647-3258 or antitrust.complaints@usdoj.gov.

7. Conflict of Interest

All Proposers must disclose any contractual or personal relationship that exists, or has existed, between the Proposer and a predecessor organization of the Proposer, or a subcontractor or team participant included in the Proposer’s response to this RFP, and RCEA or its Member Agencies, including any RCEA or Member Agency officer. Proposers must also disclose any existing business or personal relationship between the Proposer, its principals, or any affiliate or subcontractor, and RCEA, its Member Agencies, including any RCEA or Member Agency officer, or any other entity or person involved in the project that is the subject of this RFP.

Failure to disclose any such prior or existing contractual or personal relationship as described in this section may result in disqualification of the proposal. RCEA will make the final determination regarding the existence of a conflict of interest

8. Appendix of Additional Information

Proposers may include any other relevant information, or value-added services in an appendix.

6. EVALUATION PROCESS

An evaluation committee will evaluate the proposals following the submission deadline. Qualified proposers will be invited for further evaluation through interviews and/or demonstrations of their existing products. RCEA reserves the right to select the proposal that, in RCEA's sole judgement, best meets the needs described in this RFP.

The following criteria, listed in no particular order of importance, will be used to select the firms for further evaluation:

- **Completeness of response submission** - Responses should respond to each of the items set forth in the RFP.
- **Experience and Qualification** - Evaluation of the qualifications, expertise, and overall experience of the organization as well as that of the personnel specifically assigned to provide the services requested.
- **Service methodology** – Demonstrated ability to coordinate with RCEA staff in each phase to develop and implement a database solution. Provide details about service methodology in each phase of service methodology outlined in section 5.3.c above.
- **Economic feasibility and justification of all costs** – Evaluation of cost effectiveness based on respondent's cost proposal.
- **Availability** - Evaluation of the workload of the respondent and the staffing/resources to be assigned to the services requested. Evaluation of the time schedule of the respondent, and evaluation of the locations of offices and facilities from which the services are to be provided to RCEA.
- **Any other criteria RCEA deems relevant.**

The successful Proposer is expected to enter into a Professional Services Agreement with RCEA. There is no contractual agreement between the selected firm unless and until the RCEA Board or its designee, as applicable, accepts and signs the Agreement. A copy of the standard Professional Services Agreement is attached for review.

Once the RCEA Board has selected a preferred Proposer RCEA will provide a draft Professional Services Agreement to the select Proposer which will be finalized and approved by RCEA and the selected Proposer by the anticipated date included in the RFP schedule. RCEA expects that the draft Agreement will be executed by the selected Proposer in substantially the same form as presented. Proposers may, if necessary, propose exceptions to the Agreement; exceptions must be accompanied by recommended alternative language, such that the alternative language is acceptable to RCEA.

RCEA reserves the right, in its sole discretion, to terminate contract negotiations at any time, rescind its selection of a particular Proposer and begin contract negotiations with another proposer.

7. TERMS

RIGHTS OF RCEA

RCEA's rights include, but are not limited to, the following:

- Reissuing or modifying the RFP, and or issuing addenda to the RFP, including extending or revising the timeline for submittals.
- Withdrawing the RFP at any time during the procurement process.
- Requesting clarification or additional information from Proposers at any time during the procurement process.
- Execution of an Agreement with the successful Proposer on the basis of the original proposals and/or any other information submitted by the Proposers during the procurement process.

- Rejection of any or all proposals, waiving irregularities in any proposals, accepting or rejecting all or part of any proposals, and waiving any requirements of the RFP, as may be deemed in the best interest of RCEA.
- Negotiating with more than one Proposer.
- Discontinuing negotiations after commencing negotiations with a selected Proposer if progress is unsatisfactory in the sole judgment of RCEA and commencing negotiations with another qualified Proposer.

CONSEQUENCE OF SUBMISSION OF PROPOSAL

Proposal submission constitutes an incontrovertible representation and warranty by Proposer that the Proposer has investigated all aspects of this RFP, Proposer is aware of the applicable facts pertaining to the RFP process, its procedures and requirements, Proposer has read and understands the RFP and complied with every requirement.

Without exception, the proposal is premised upon performing and furnishing the services required by this RFP and as such means, methods, techniques as may be indicated or required by this RFP.

All responses shall remain valid for a period of not less than 120 days from the submission.

The submission of a proposal shall not be deemed an agreement between the Proposer and RCEA, and the following conditions apply:

- RCEA shall not be obligated to respond to any proposal submitted, nor is bound in any manner by the submission of a proposal by a Proposer.
- Selection of consideration by RCEA obligates the Proposer to enter into good faith Agreement negotiations on the proposal submitted.
- The Agreement shall not be binding or valid against RCEA unless and until it is executed by the RCEA Board and the selected Proposer.

This RFP constitutes part of each response and includes the explanation of RCEA's needs, which must be met. This RFP and all materials submitted in response to this RFP will become the property of RCEA.

PROPOSAL COSTS

Costs of investigating, preparing, and submitting a proposal is the sole responsibility of the Proposer and shall not be chargeable in any manner to RCEA. RCEA will not reimburse any Proposer for any costs associated with the preparation and submission of proposals or expenses incurred in making an oral presentation, participating in an interview, or negotiating an Agreement with RCEA regardless of whether RCEA discontinues negotiations at any time or if negotiations result in a final Agreement.

PUBLIC NATURE OF PROPOSAL MATERIAL

All responses to this RFP, including proposals, pre-submittal, and post-submittal communications with RCEA, will become the exclusive property of RCEA. Proposals and communications with RCEA are subject to disclosure in accordance with the California Public Records Act (Cal. Government Code section 6250 et seq.).

If you believe that there are portions of your proposal which are exempt from disclosure under the Public Records Act, you must mark the pages and portions of your Proposal as such and state the specific provision in the Public Records Act which provides the exemption as well as the factual basis for claiming the exemption. For example, if you submit trade secret information, you must plainly

mark the information as "Trade Secret, Government Code Section 6254(k)," or equivalent. In all cases the main, non-confidential sections of the proposal should contain adequate detail to characterize the Proposer's approach and qualifications without the need to reference information the Proposer believes to qualify for confidential treatment.

The Proposer is solely responsible for identifying and labeling any information contained within a proposal that may be subject to an exemption from public disclosure. Only those portions of a proposal which are actually exempt from disclosure under state law will be withheld from disclosure, regardless of whether labeled by the Proposer as exempt.

RCEA has determined that the public interest will be best served if proposals submitted in response to this RFP are not made available for review by other companies participating in the competitive selection process. For that reason, proposals submitted during the RFP process will not be made available to other Proposers or the public earlier than the date on which RCEA's CCA Board Subcommittee issues to the RCEA Board a recommendation of a company or team for selection. At this time, all parts of all proposals are subject to public disclosure excepting those portions clearly labeled or marked by the Proposer as subject to non-disclosure pursuant to state law, provided such portions are exempt.

The RCEA Executive Director may in his sole discretion after consultation with RCEA legal counsel, defer public disclosure of any or all proposal contents until RCEA Board approval of a Service Agreement. In such event, Proposals (excepting those portions that are exempt from public disclosure pursuant to state law) shall be available for disclosure at the same time the final Professional Service Agreement is forwarded to the Board for approval.

Prior to the date on which the Board of Directors selects its preferred Proposer, RCEA will limit the release of Proposal contents as described above. If at any time during or after the selection process RCEA receives a request to review and/or copy materials submitted by any Proposer that they have marked as confidential, RCEA will decline release of those materials as set out above.

If the person submitting the request files a legal action against RCEA seeking its release, RCEA will notify the affected Proposer(s) and will not oppose a motion by such Proposer(s) to intervene in the action. The Proposer(s) must either intervene or agree to pay RCEA and its agent(s) legal expenses in defending the action, including fees, if any, awarded to the plaintiff. Absent such an agreement, the RCEA will have no obligation to defend the action and may release the information sought without any liability whatsoever.

BY SUBMITTING A PROPOSAL, PROPOSERS AGREE TO HOLD HARMLESS AND NOT SEEK DAMAGES AGAINST RCEA, ITS OFFICERS, EMPLOYEES AND AGENTS, OR ANY MEMBER GOVERNMENT OR RECOVERY OF ITS ATTORNEYS' FEES AS A RESULT OF ANY DISPUTE RELATED TO THE RELEASE OR WITHHOLDING OF INFORMATION SUBMITTED IN RESPONSE TO THIS RFP.

PROPOSER CODE OF CONDUCT

Proposers are required to adhere to the following Proposer Code of Conduct:

- No Proposer including any member of a proposal development team may engage in ex parte communications with RCEA staff, RCEA Board members, or elected officials of RCEA Member Governments;
- No Proposer including any member of a proposal development team may give any gift or monetary compensation to an RCEA Board member, RCEA staff member or agent, or proposal reviewers; and

- No Proposer including any member of a proposal development team may collaborate or discuss with other Proposers the content of the proposal or rates proposed, or otherwise collude with other parties submitting proposals, which shall be confirmed by the required Anti-Collusion Statement.

Failure to abide by the above will result in the proposal being disqualified.

NON-DISCRIMINATION

Proposers may not engage in any discriminatory hiring or employment practices and shall make personnel policies available to RCEA upon request. Proposers shall ensure equal employment opportunity based on objective standards of recruitment, selection, promotion, classification, compensation, performance evaluations, and management relations, for all employees under any contract that may result from this submittal. No person shall, on the grounds of race, color, creed, national origin, religious affiliation or non-affiliation, sex, sexual orientation, marital status, age, disability, medical condition (including but not limited to AIDS, HIV positive diagnosis or cancer), political affiliation or union membership be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any contract that may result from this submittal.

ATTACHMENTS

1. Professional Services Agreement Template

APPENDIX A – Database Needs and Desired functions

Table 1. Desired database user functions

I want to	Priority
Record site data from assessments	Need
Look up customer account information using multiple identifiers	Need
Create lead lists for targeted marketing	Need
Analyze customer energy usage	Need
Analyze customer billing data	Need
Track delivery of program services (all programs) from start to finish	Need
Track a project from start to finish	Need
Track measures installed or incentivized	Need
Track incentive and rebate reservations and commitments for all programs	Need
Track forecasted service completion and project completion dates	Need
Assign customer roles and staff roles	Need
Calculate Energy Use Intensity	Need
Calculate blended rates	Need
Calculate Energy Savings	Need
Track contracting for a project	Need
Track a customers application status	Need
Verify customer eligibility for programs	Need
View and export each program's performance toward goals	Need
Create CPUC required CEDARS reports for monthly, quarterly, and annual reporting	Need
Export data in PG&E required formats for monthly, quarterly, and annual reporting	Need
Schedule database and report updates in coordination with CEDARS platform updates and measure updates	Need
Schedule database and report updates in coordination with new program launches and program updates	Need
Query data for internal and external reporting, performance, quality control, and program evaluation	Need
Securely access the database remotely	Need
Meet data security and confidentiality requirements of RCEA, CPUC, and PG&E	Need
Set user permissions	Need
Track customer service interactions	Need
Track customer marketing and outreach	Need
Transfer files securely to external parties	Need
Export mapping data of leads	Need

I want to	Priority
Forecast program performance	Want
Support the evaluation of a new measures and their impact to program cost-effectiveness	Want
Import deemed measure data from CA eTRM	Want
Visualize customer energy usage data	Want
Synchronize with Cal Pine CRM	Want
Complete remote data entry from tablet or phone	Want
Import existing data from Access databases	Want
Track event and workshop participation	Want
Have secure chat recorded	Want
Accept online customer applications and agreements	Want
Produce editable customer reports (or export data for reports)	Want
Produce contractor scopes of work, equipment lists, and change orders	Want
Track program funding and budgets	Want
Group/link accounts by a parent	Want
Show maps of areas served and leads	Want
Accept online customer feedback through surveys	Want

Table 2. Data sets for storing and tracking in the database

Source	Category	Data	Priority
Manual entry	Customer Information	Contact Information	Need
Imported	Customer Information	Account Numbers	Need
Imported	Customer Information	Rate Schedule	Need
Imported	Customer Information	Meter Location	Need
Imported	Customer Information	NAICs Code	Need
Imported	Customer Information	Customer Energy Usage	Need
Imported	Customer Information	Customer Billing History	Need
Manual entry	Customer Relationship Management	Customer service interactions	Need
Manual entry	Customer Relationship Management	Customer program participation	Need
Manual entry	Customer Relationship Management	Referrals to outside third-party programs	Need
Manual entry	Customer Relationship Management	Customer lead information and status	Need
Manual entry	Customer Relationship Management	Customer marketing efforts	Want
Manual entry	Program Management and Reporting	Customer application tracking through program	Need
Manual entry	Program Management and Reporting	Customer Qualifications and Eligibility	Need
Manual entry	Program Management and Reporting	Energy Savings Goals	Need
Manual entry	Program Management and Reporting	Event/Workshop Participation	Need
Manual entry	Program Management and Reporting	Required fields for CEDARS-based reporting to CPUC	Need
Manual entry	Program Management and Reporting	Services provided	Need
Imported	Program Management and Reporting	Deemed measure data from workpapers	Want
Manual entry	Program Management and Reporting	Program and incentive Budgets and spending	Want

Source	Category	Data	Priority
Manual entry	Project Management	Project progress and Status	Need
Manual entry	Project Management	Assignment of Roles	Need
Manual entry	Project Management	Site assessment Data	Need
Manual entry	Project Management	Measures Installed or Incentivized	Need
Manual entry	Project Management	Project costs	Need
Manual entry	Project Management	Financing Status	Need
Calculated or Imported	Project Management	Savings Data	Need
Manual entry	Project Management	Contracting Tracking (Bidding, Change Orders and Compliance)	Need
Calculated	Project Management	Project Financials (Cost savings, Payback, NPV)	Need
Manual entry	Project Management	Project non-energy benefits	Want
Manual entry	Project Management	Customer recommendations	Want
Manual entry	Project Management	Customer participation agreement/ work order language	Want
Manual entry	Site Information	built environment data (appliances, lighting, HVAC)	Need
Manual entry	Site Information	Location and Address	Need
Calculated	Site Information	Energy Use Intensity	Need

APPENDIX B
NON-COLLUSION DECLARATION

To be executed by the bidder and submitted with the bid.

The undersigned declares:

I am the _____ of _____, the party making the foregoing bid.

The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on _____ date, at _____ city, _____ state.

Date: _____

Signature