



REQUEST FOR PROPOSALS
Advanced Energy Center Vendors

TO: All Prospective Respondents
SUBJECT: Request for Proposals: Advanced Energy Center Vendors
DATE ISSUED: February 15, 2019
RESPONSES DUE: March 29, 2019

I. PROJECT SUMMARY

Sonoma Clean Power Authority (“SCP”) issues this Request for Proposals (RFP) to solicit proposals from qualified vendors (“Vendors”) for SCP’s Advanced Energy Center. SCP’s Advanced Energy Center will connect SCP customers directly with new and innovative energy efficiency and/or fuel switching products. Vendors selected for the Advanced Energy Center will (A) create displays and offer energy efficient and fuel switching products for sale directly to consumers in the Advanced Energy Center, (B) potentially offer discounts on energy efficient and fuel switching products to consumers; (C) provide a listing of at least 3 contractors that can install such products; and (D) provide other related products and services in furtherance of the mission of the Advanced Energy Center. SCP’s target date for the opening of the Advanced Energy Center is October 2019.

Minority-owned, women-owned and locally-headquartered businesses are encouraged to respond to this RFP.

II. ABOUT SONOMA CLEAN POWER

SCP is a public, locally-run “community choice aggregation” power provider covering approximately 525,000 customers in Sonoma and Mendocino Counties (except Healdsburg and Ukiah). SCP’s mission is to help solve the climate crisis while keeping energy affordable. For more information about SCP go to: www.sonomacleanpower.org.

III. RFP TIMELINE

EVENT	DEADLINE
RFP Published	5pm PST 02/15/2019
Deadline for questions to be submitted	5pm PST 03/01/2019
Responses to questions to be posted on SCP website	5pm PST 03/08/2019
Proposal packages due	5pm PST 03/29/2019
RFP Submission review complete	5pm PST 04/12/2019

IV. PROJECT BACKGROUND & SCOPE

A. CEC Grant Funding & SCP's Advanced Energy Center

In January 2018, SCP was awarded a California Energy Commission (“CEC”) EPIC (Grant No. 17-304). The CEC EPIC grant provides \$13 million dollars to SCP for a variety of energy-related projects, including for SCP to build an Advanced Energy Center to expedite energy efficiency and fuel switching retrofits in Sonoma and Mendocino counties. As discussed in more detail in this RFP, Vendors are required to meet all CEC grant requirements, including detailed reporting and invoicing. The CEC Grant requirements are incorporated into SCP's Standard Agreement. SCP's Standard Agreement is attached to this RFP as Exhibit A.

The Advanced Energy Center will be located in a 9,400 s.f. space in downtown Santa Rosa. The Advanced Energy Center will be staffed by SCP employees and representatives.

SCP will provide the Advanced Energy Center venue for SCP customers and Vendors, and provide financial incentives to SCP customers for private purchase of energy efficient/fuel switching products. Financial incentives offered by SCP include: rebates to customers, payment of permit fees for the Vendors, and an on-bill financing program.

SCP customers will contract directly with Vendors for the purchase of energy efficient/fuel switching products. For installation of the energy efficient/fuel switching products, SCP customers may either use a contractor-matching web platform available at the Advanced Energy Center to select and schedule a contractor for installation, or the SCP customer can independently select their own contractor for installation services. SCP is not selling or installing any of the energy efficient/fuel switching products.

B. Vendors Services and Offerings in the Advanced Energy Center

Product Offerings & Displays. SCP is seeking Vendors to offer energy efficient/fuel switching products directly to customers in SCP's Advanced Energy Center. In offering such products, SCP is seeking Vendors that will: (1) provide creative, interactive displays; (2) offer discounts and incentives and participate in SCP programs (e.g. on-bill financing) through the Advanced Energy Center for energy efficient and fuel switching products offered to customers; and (3) allow for energy efficient/fuel switching products to be tested and purchased on-site.

Qualified Contractor Matching. Vendors will also be expected to connect customers directly with qualified contractors that can install the energy efficient/fuel switching products, including by using a contractor matching tool at the Advanced Energy Center to pair customers and qualified contractors.

Participation in Advanced Energy Center Marketing & Trainings. SCP expects to partner with Vendors in marketing and outreach through the Advanced Energy Center to encourage SCP customers to purchase energy efficient/fuel switching products from Vendors through the Advanced Energy Center. SCP is also seeking

Vendors that will participate with SCP through the Advanced Energy Center to organize trainings to help customers, contractors, real estate professionals, and design professionals understand the benefits of the energy efficient/fuel switching products.

C. Vendor Space in the Advanced Energy Center

SCP estimates space in the Advanced Energy Center for approximately 20 selected Vendors. Each selected Vendor will be allocated a designated space within the Advanced Energy Center to display its energy efficient/fuel switching products. SCP estimates that each designated space will vary, based on individual Vendor proposals and SCP's selection of Vendors, but SCP estimates that each designated space would contain an area of approximately 5' x 5' with a height of 6'. SCP reserves the right to alter the number of Vendors selected and the allocated designated space as SCP evaluates proposals.

D. Vendor Products in the Advanced Energy Center

SCP is seeking innovative, market-ready, energy efficient or fuel switching products such as, but not limited to: Minisplit Heat Pumps, Induction Cooktops, Aerosol Sealing, Heat Recovery Ventilators, Drainwater Heat Recovery, Phase Change Materials, Economizers, Battery Storage, Smart Thermostats, Photovoltaic Paneling, Radiant Heating Ceiling Panels, and Heat Pump Water Heaters. SCP reserves the right to supplement or otherwise modify this list

V. VENDOR & PRODUCT REQUIREMENTS

A. Minimum Vendor Requirements. The selected Vendors must:

1. Have local distribution within the State of California, with a preference for vendors and/or distributors within the SCP service area.
2. Agree to report to SCP on a minimum of a monthly basis, with a preference for weekly reporting or real-time data through OpenADR reports or equivalent. Vendors must agree to include the following in their reports: total units sold, property location of units sold, energy use of product (including 15-minute interval level data), and other product-specific metrics or other information reasonably requested by SCP or otherwise required by the CEC Grant.
3. In coordination with SCP, make a commitment to local contractor training and certification program for your product. Vendor agrees that such a training program will include educational trainings and resources and a plan for contractor evaluation.
4. Identify a minimum of 3 licensed, qualified contractors that are able to install any product that requires contractor installation.
5. Perform adequate screening and verification of such contractors to ensure SCP customer safety. Vendor's recommended

contractors must also agree to be listed in SCP's contractor matching tool for the Advanced Energy Center.

6. Work with SCP to design product-specific website tools, including the following: product landing pages with product photos, descriptions, and energy savings; pre- and post-installation surveys to be distributed through e-mail to SCP customers; and other items as requested by SCP.
 7. Establish key SCP customer relationship and response protocols in a form reasonably satisfactory to SCP, including:
 - (a) A process for answering technology-specific questions from SCP staff, SCP customers, or participating contractors.
 - (b) A process and timeframe for responding to and resolving customer complaints concerning Vendor's energy efficient/fuel switching products or its installation by Vendor-recommended contractors.
 - (c) A process and timeframe for SCP customer returns or cancelations for energy efficient/fuel switching products or its installation by Vendor-recommended contractors
 - (d) Designation of a primary point of contact for SCP Advanced Energy Center staff
 8. Have the ability to ship Vendor's energy efficient/fuel switching products or engage with local distribution channels within 3-5 business days from the order date.
 9. Be able to sell and distribute to the entire Sonoma Clean Power service territory.
 10. Participate in an exit interview with SCP and provide feedback on the Lead Locally Program as requested.
 11. Assist in any other customer-service related questions as needed. This need will be vendor specific and specified further in the awarded contract.
 12. Agree to comply with all terms and conditions of the CEC Grant.
 13. Construct, maintain, modify and disassemble Vendor display in Advanced Energy Center at Vendor's sole cost.
- B. Desired Vendor Characteristics. In addition to the requirements above, the following characteristics are desirable in proposing Vendors:

1. SCP is planning to offer rebates/financing to Advanced Energy Center customers on selected products. A desirable Vendor will co-finance and/or offer additional rebates.
2. The Advanced Energy Center will feature creative, interactive displays for each technology. A desirable Vendor will work with SCP team on creative, non-traditional ways to engage SCP customers using product displays.
3. SCP plans to assist with marketing energy efficient/fuel switching products in the Advanced Energy Center and will have final approval overall marketing products. A desirable characteristic for Vendors is willingness to assist with development of collateral materials or presentations, as requested by SCP or its agents, and would assist with creative ideas in product marketing.
4. The Advanced Energy Center will feature monthly trainings to help engage SCP customers, contractors, design professionals, real estate agents, code officials, and other relevant parties on energy efficiency technologies. Though not required, it is desired that a Vendor will participate in the development, staffing and teaching of such trainings.
5. Offer incentives and/or rebates on Vendor's energy efficient/fuel switching products in the Advanced Energy Center. Vendors must make any incentives and/or rebates available to all Participants throughout the duration of the program (ending June 2022).

C. Minimum Product Requirements. Selected Vendor's products shall:

1. Be innovative, market ready, energy efficient and/or fuel switching technologies including, but not limited to: Minisplit Heat Pumps, Induction Cooktops, Aerosol Sealing, Heat Recovery Ventilators, Drainwater Heat Recovery, Phase Change Materials, Economizers, battery storage, smart thermostats, photovoltaic paneling, radiant heating ceiling panels, and Heat Pump Water Heaters.
2. Be able to be displayed within the designated space provided at the Advanced Energy Center. As noted above, SCP estimates each Vendor space would contain an area of approximately 5' x 5' with a height of 6', though overall space may vary at the discretion of SCP.
3. Be Underwriter Laboratory (UL) listed, if applicable.
4. Provide SCP customers with a warranty period of no less than 1 years from purchase, with a preference for longer warranty periods.

- D. Desired Product Requirements and Features. In addition to the requirements above, the following characteristics are desirable in Vendor Products:
1. Technologies should be capable of providing, either alone or in tandem with other technologies, 10% electricity savings in residential applications and 20% electricity savings in commercial applications.
 2. If applicable, Product shall be capable of receiving an OpenADR 2.0b signal, and vendor can provide OpenADR reports. SCP seeks to go beyond standard energy efficiency and incorporate demand response features in product offerings.
 3. Be energy efficient/fuel switching products beyond those already eligible for existing PG&E incentives. SCP customers are already eligible for any existing PG&E incentives for products. A list of available incentives is available on PG&E website at: https://www.pge.com/en_US/residential/save-energy-money/savings-solutions-and-rebates/rebates-by-product/rebates-by-product.page.

VI. SELECTION PROCESS

- A. Responses will be scored based on:
1. Thoroughness and creativity of response.
 2. Energy savings potential of product(s).
 3. Diversity of product(s)
 4. Professional qualifications and demonstrated ability of Vendor to perform the work.
 5. Amount of product incentives, rebates and discounts proposed to be offered to SCP customers.
 6. Vendor proposals re: contractor training program package.
 7. Completeness of a Vendor's proposed display design for the Advanced Energy Center.
 8. The extent of any supplemental advertising and public outreach efforts Vendor is willing to undertake in support of the Advanced Energy Center.
 9. Vendor's competence, technical ability and related experience.
 10. Ability and history of successfully completing projects of a similar type, meeting delivery deadlines and experience with similar work.
 11. Exceptions to SCP's Standard Agreement (Exhibit A).
 12. Completeness and quality of proposal.
 13. Quality of references.
 14. Satisfaction of minimum and desired Vendor and Product requirements.
 15. Any other factors SCP deems relevant, such as the overall range and balance of Products and Vendors in the Advanced Energy Center.
- B. Depending on the responses to this RFP and interviews, SCP may choose to contract with more than one firm or individual. Any selected

Vendor(s) will be contacted by SCP staff to finalize a contract. SCP staff will evaluate the responses to this RFP, may, in its discretion, interview selected firms and individuals that staff determine are most qualified.

- C. SCP may contract with multiple Vendors offering similar Products in the Advanced Energy Center.
- D. Issuance of this RFP is not a guarantee that SCP will enter into any contract with any respondent. SCP reserves the right, at its sole discretion, to waive irregularities in proposals, proposal requirements (including minimum/desired Vendor and Product requirements), to request modifications of any proposal, to accept or reject any or all proposals received, and to cancel all or part of this RFP at any time prior to awards.
- E. Responses that do not satisfy RFP and Proposal Requirements cannot be adequately evaluated.

VII. QUESTIONS REGARDING THE RFP; ADDENDA

For questions regarding this RFP, please contact: programs@sonomacleanpower.org with the subject line clearly marked "Advanced Energy Center Vendors RFP." Questions must be received no later than the deadline set forth in section III of this RFP. Questions received after the deadline will not be addressed by SCP. SCP will post and share responses to all questions submitted by the deadline established in this RFP publicly.

In the event it becomes necessary to revise any part of this RFP, SCP will issue written addenda. Any amendment to this RFP is only valid if it is in writing and issued by SCP. No oral interpretations or answers will bind SCP. All addenda issued by SCP will become part of this RFP.

VIII. RFP SUBMITTAL PROCESS

- A. Submittal Deadline. The deadline for submittal of proposals is 5:00 p.m. on March 29, 2019. No proposals will be accepted after that time.
- B. Place and Form of Submittal. One copy of the proposal should be emailed (preferred method), mailed, or hand delivered to:

Sonoma Clean Power, 50 Santa Rosa Avenue, 5th floor, Santa Rosa, 95404, Attention: Chad Asay, Programs Manager,
programs@sonomacleanpower.org

1. Hard copy submittals are to be printed double-sided on 8-1/2" x 11" recycled content paper where applicable. Please do not bind submissions or submit plastic covers. Faxed responses will not be accepted.
2. Email submittals should be sent to programs@sonomacleanpower.org with the subject line clearly marked "Lead Locally Advanced Energy Center Vendors RFP". Upon submittal, you will receive a confirmation of receipt.

- C. Submission of a Proposal shall be deemed a representation that the Vendor:
 - 1. Has carefully read and fully understands the information provided by SCP as part of this RFP, including all Exhibits;
 - 2. Represents that all information submitted is true and correct;
 - 3. Did not, in any way, collude, conspire to agree, directly or indirectly, with any person, firm, corporation or other Firm in regard to the amount, terms or conditions of its Proposal; and
 - 4. Acknowledges that SCP has the right to make any inquiry it deems appropriate to substantiate or supplement information as necessary.
- D. No request for modification of a Proposal shall be considered after submission on the grounds that a Firm was not fully informed about any fact or condition.

IX. PROPOSAL REQUIREMENTS

- A. Proposers should provide only complete and accurate information.
- B. Each proposal must be signed by an individual who has the legal authority to bind the proposer on whose behalf that person is signing.
- C. The proposal shall contain the following sections (1-8), and be no longer than 50 pages, minus attachments. In addition to addressing sections 1-8, each Proposal should include an Attachment 1, described below, which does not count towards the page limit.
 - 1. Cover Sheet. Cover sheet signed by individual with authority to bind firm.
 - 2. Company information. Submit a brief history and description of your company's operations. Include the following:
 - (a) The scope and nature of your company
 - (b) Years of operation
 - (c) Resumes of key personnel
 - (d) Number of full-time employees
 - (e) Identify your company's standard hours of operation
 - (f) Identify your company's annual sales per technology
 - (g) Link to your company's website
 - 3. Product information. Submit a description and technical information related to your product(s). This section should include:
 - (a) The product cost (separated into hardware, software, installation costs as appropriate), including any bulk

- pricing discounts or vendor discounts or other incentives that can be offered.
- (b) Technical information and/or product cutsheets relevant to your product.
 - (c) Information on product warranties and maintenance.
 - (d) Information on reporting, what metrics you and/or your product would be able to report to SCP and what format reporting would be received in.
 - (e) Any control systems your product can use to respond to market signals.
4. Experience. Discuss similar programs your company has worked on or participated in, including number of technologies deployed and contracting party. Please include programs in California and/or programs working with utilities, if applicable. For each program, please provide (1) reference.
 5. Training approach. Submit a brief history and description of your company's existing engagement with contractors and your proposed plan for this program. Include the following:
 - (a) Describe any existing contractor training programs, and how you propose these programs would be modified for this effort.
 - (b) Describe your typical oversight/engagement with contractors, and how you propose these programs would be modified for this effort.
 - (c) Describe any existing trainings that could be offered to SCP customers, design professionals, real estate agents, etc. or any trainings that you would propose creating for this effort.
 6. Distribution. Identify the existing distribution channels that you would be leveraging for this effort, including locations for all distribution channel partners.
 7. Marketing and Design, Vendor Display. Describe your display for your product in the Advanced Energy Center. If relevant, include examples of previous displays that your company has provided. Describe any requirements you have concerning Vendor Display installation, maintenance and removal. Describe your desired involvement with marketing for this program.
 8. Standard Agreement Exceptions. Identify exceptions to SCP's Standard Agreement (Exhibit A).
 9. Proposal - Attachment 1: In addition to the information set forth above, Proposers should include as Attachment 1 to its proposal links or attachments for up to 3 technical studies or whitepapers for your product. This Attachment 1 will not count towards the 20 page submittal limit. Studies should include:
 - (a) A description of the project/study. Preference will be given to studies conducted in climate zones similar to

- Sonoma and Mendocino counties, or studies with savings that can be extrapolated to the Sonoma and Mendocino.
- (b) As applicable, total costs to consumer of installing product.
 - (c) kWh Savings.
 - (d) Therm Savings.
 - (e) kW Savings.
 - (f) Greenhouse Gas Savings.
 - (g) Other quantifiable or non-quantifiable benefits to the consumer.

X. CALIFORNIA ENERGY COMMISSION

This Project is partially funded by a grant from the California Energy Commission (“CEC”). As such, it is required that the successful Vendor, if any, and its subcontractors must comply with all requirements set forth in the CEC’s Electric Program Investment Charge (EPIC) Standard Grant Terms and Conditions (the “CEC Terms”), including requirements such as prevailing wage. The CEC Terms are included in this RFP as an attachment to SCP’s Sample Agreement (Exhibit A attached to this RFP). Because SCP must comply with the CEC Terms as a condition of receipt of grant funding, SCP will not consider any exceptions to these terms.

XI. GENERAL TERMS AND CONDITIONS

A. SCP Standard Agreement.

1. Contracts for services will be between the Vendor and SCP. A sample of SCP’s Standard Agreement is included as Exhibit A. Vendors must be willing to provide the required insurance and accept the terms of SCP’s Standard Agreement. A Vendor taking exception to any part of the Standard Agreement must also provide alternative language for those provisions considered objectionable. Please note that any exceptions or changes requested to the Standard Agreement may constitute grounds to reject the Proposal.
2. Failure to address exceptions to the Standard Agreement in your statement will be construed as acceptance of all terms and conditions contained therein. No negotiation over Standard Agreement provisions will be permitted unless the provisions were objected to when the Proposal was submitted.
3. SCP reserves the right to further negotiate existing or additional elements of its Standard Agreement with successful proposers.

- B. California Public Records Act. All proposals submitted in response to this request shall be subject to disclosure under the California Public Records Act. In the event that a Proposer desires to claim portions of its proposal exempt from disclosure, it is incumbent upon the Proposer to clearly identify those portions with the word “confidential” printed on the lower right-hand corner of the page. SCP will consider a Proposer’s request for exemption from disclosure; however, SCP will make a decision based upon applicable laws. Assertions by a Proposer that the

entire proposal or large portions are exempt from disclosure will not be honored. All responses to this Request for Proposals shall become the property of SCP and will be retained or disposed of accordingly.

- C. SCP also reserves the right to negotiate any price or provisions and accept any part, or all parts of any or all submittals, whichever is in the best interest of SCP.
- D. All proposals received by the specified deadline will be reviewed by SCP for content, including but not limited to amount of discount offered, experience and qualifications of the bidding Vendors.
- E. During the evaluation process SCP may request from any Vendor additional information which SCP deems necessary to determine the Vendor's ability to perform the required services.
- F. Respondents bear all costs associated with responding to this RFP, and SCP will provide no compensation for these costs.

XII. RIGHTS OF SONOMA CLEAN POWER

- A. This RFP does not commit SCP to enter into a contract, nor does it obligate SCP to pay for any costs incurred in the preparation and submission of a qualifications statement or in anticipation of a contract.
- B. SCP reserves the right to:
 - 1. Make the selection based on its sole discretion;
 - 2. Reject any and all Statements of Proposals;
 - 3. Issue subsequent solicitations;
 - 4. Postpone any of the time periods set forth in this RFP, for its own convenience;
 - 5. Remedy technical errors in the RFP;
 - 6. Approve or disapprove the use of particular subconsultants;
 - 7. Negotiate with any, all, multiple or none of the Proposers that respond;
 - 8. Alter SCP's Standard Agreement to be inclusive of any unique, unanticipated legal concerns, including, without limitation, issues related to Vendor's technology, display or services provided in the Advanced Energy Center.
 - 9. Negotiate a final project scope that includes all, just a portion or related additional items relative to the Proposed Project Scope set forth in this RFP;
 - 10. Waive informalities and irregularities in the Proposal Statement;
 - 11. Utilize others to perform or supply work of the type contemplated by this RFP;
 - 12. Request proposals from others with or without requesting proposals from contractors for the work of the type contemplated by this RFP; and/or
 - 13. Enter into an agreement with another Firm or re-solicit the Project in the event the originally selected firm defaults or fails to execute an agreement with SCP.

- C. SCP reserves the right not to contract with any Vendor. If SCP decides to contract, SCP will contract with the Vendors whose responses best meets the needs of SCP, consistent with the selection process set forth above.
- D. An agreement is not binding or valid with SCP unless and until it is executed by authorized representatives of SCP and the Vendor selected.
- E. Evaluation of a response does not constitute a commitment by SCP to acquire such services from any source. SCP is not obligated in any way to proceed with this RFP or consider or enter into any agreement or undertake any liability to any firm in connection with this RFQ and any and all responses, whether qualified or not, may be rejected without any liability whatsoever to any firm on the part of SCP. SCP shall not be responsible for any costs incurred by a firm to prepare, submit, negotiate, contract or otherwise participate in this RFP process.