Smart Thermostat Installations, HVAC Tune-Ups, and Home Energy Assessments

Pre-Proposal Webinar

Sonoma Clean Power

Agenda

1. Welcome & Webinar Logistics

2. About SCP & GridSavvy Rewards

3. RFP Background

4. RFP Submission Requirements

5. RFP Timeline

6. Questions

Webinar Logistics

- This webinar is being recorded

- The recording will be posted on our website

- Please submit questions using the Q&A feature

- Select the Send anonymously check box to submit the question without your name associated with it
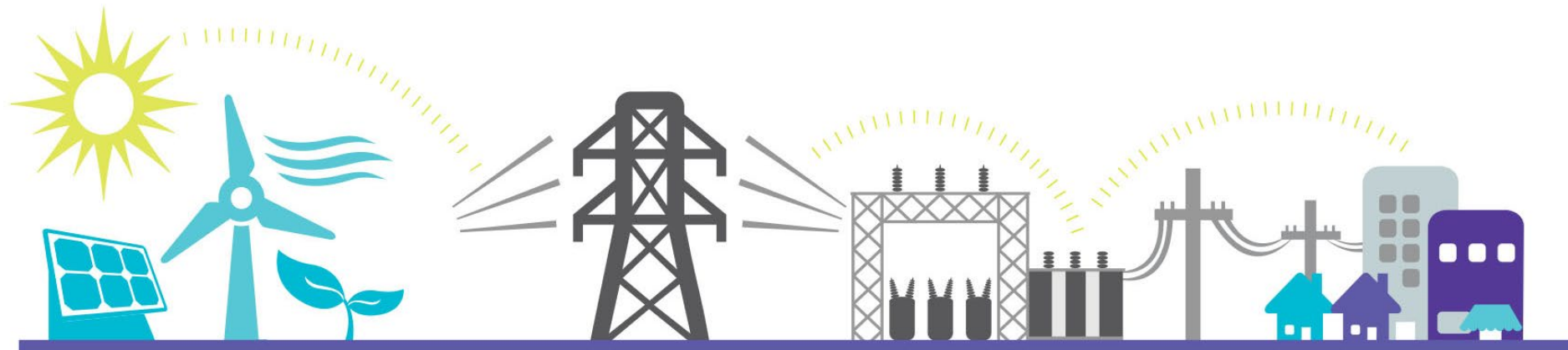
Sonoma Clean Power

Who we are

Power with Purpose

- Public agency that serves approximately 86% of homes and businesses in Sonoma and Mendocino Counties with clean energy

- Default service provider

- Self-funded through revenues – no tax dollars

- Run by a Board of Directors and Community Advisory Committee

- Provides offers and incentives tailored to our community

generation
SCP

buys cleaner
energy sources,
provides programs

delivery
PG&E

delivers energy,
maintains the grid,
provides bill

customer
YOU

cleaner energy,
local control and
competitive rates

Service Territory

Mendocino County (excluding Ukiah) – Est 2017

• Fort Bragg, Point Arena, Willits

• Unincorporated Mendocino County

Sonoma County (excluding Healdsburg) – Est 2014

• Cloverdale, Cotati, Petaluma, Rohnert Park, Santa Rosa, Sebastopol, Sonoma, Windsor

• Unincorporated Sonoma County

CEC Grant and Virtual Power Plant Initiative

- $4.9 million California Energy Commission grant to demonstrate community-based virtual power plant approaches

- Aims to increase access to automated smart devices for low-income customers, where participation in SCP's GridSavvy Rewards program has been historically limited

- The grant has multiple objectives, <u>only one of which is direct install of smart thermostats</u>

About GridSavvy Rewards

GridSavvy Rewards

- Save energy, earn money!

- Cutting back on electricity during peak hours reduces reliance on gas power plants and helps avoid rolling blackouts

- Efforts earn rewards and support our use of local, clean energy for a resilient electric grid

- Can sign up for alerts and connect smart devices

GridSavvy Rewards
Smart Thermostats

- No action needed after enrolling

- SCP adjusts the thermostat for the customer when needed to reduce grid stress (May-October)

- Small adjustment: +/- 3°F during grid events

- Automatically pre-cools home before energy-saving event

- Customers can override at any time – no penalties!

RFP Background

Overview

Smart thermostat installation & enrollment in GridSavvy Rewards

HVAC Tune-Up

Home Energy Assessment

Program Management

Target Audience: Low-income customers

Background

- Currently offer incentives for smart thermostats but installation support

- Self-installations can be difficult for customers

- Finding and scheduling a contractor takes time and effort

- Low-income customers often join GridSavvy Rewards and receive text messages to reduce energy, but rarely enroll a smart thermostat

Vision

- Simple for the customer, no out-of-pocket cost

- Increase the number of low-income customers participating in GridSavvy Rewards with smart thermostat

- Partner with trusted community organizations for outreach

Anticipated Volumes

Smart Thermostat Installations
Up to 1,000

HVAC Tune-Ups
Up to 1,000, evaluate at 300

Home Energy Assessments
Up to 1,000, evaluate at 300

Program Implementation & Responsibilities

- Vendor responsibilities include:

  - Help finalizing program design and processes, including identifying efficient tracking and scheduling methods

  - Managing customer interactions throughout the process

  - Ensuring availability of trained installers and technicians for service delivery

  - Handling administrative tasks such as documentation and invoicing

- Optional services:

  - Bulk purchasing of smart thermostats

  - Workforce development initiatives

- SCP's role: Program administrator overseeing overall operations

RFP Submittal Requirements

RFP Response Requirements

1. Cover Letter

2. Approach

3. Proposer's Qualifications

4. Relevant Experience

5. Cost Proposal

6. Resumes

7. References

8. Organizational Capacity

9. Primary Point of Contact

10. Standard Agreement Exceptions

Cost Table & Prevailing Wage Requirements

Pricing format

Task / Expense	Pricing
1: Project management	$/month
2: Labor (prevailing wage) and equipment for smart thermostat installation (up to 1,000 sites)	$/site
3: Equipment – smart thermostat (Google Nest Generation 3)	$/unit
4: Labor (prevailing wage) and equipment for HVAC system tune-ups (up to 1,000 sites) including a detailed report	$/assessment
5: Equipment for HVAC Tune-up - filters	$/site
6: Refrigerant recharge per refrigerant type (R-22, R-134a, R-410A)	$/lb. per type
7: Labor (prevailing wage) for energy assessments (up to 1,000 sites) including a detailed report	$/assessment
8: Personnel hourly rates for tasks not identified in scope of services	$/hour

Note: All labor pricing must include travel and mileage costs.
Note: The Proposer may split up pricing by Sonoma County and Mendocino County if desired.

RFP Review

Proposals will be evaluated based on:

1. Thoroughness and quality of response
2. Qualifications and experience of the firm and staff
3. Demonstration of previous work experience aligned with this solicitation
4. Satisfaction of the Scope of Services, as described in the RFP
5. Additional objectives provided, as described in the RFP
6. Staffing plan
7. Pricing
8. Quality of references
9. Stated exceptions to SCP's contract template or insurance requirements
10. Any other factors SCP deems relevant

RFP Timeline

RFP Timeline

Event	Deadline
RFP Published	March 3, 2025
Pre-proposal webinar	March 14, 2025 at 9:00 AM PDT
Deadline for written questions to be submitted	March 21, 2025 at 5:00 PM PDT
Responses to questions to be posted on SCP website	March 28, 2025
Proposal packages due	April 14, 2025 at 5:00 PM PDT
RFP Submission review complete	May 2, 2025
Interviews	May 6-7, 2025 *tentative*
Contract Execution	July 7, 2025

Questions