

**Responses to questions on Sonoma Clean Power's Technical Assistance for Zero Energy Buildings including End-Use Fuel Switching Request for Qualifications**

February 14, 2017

**IMPORTANT: The deadline for submissions is extended to 5:00 PM Pacific Time on February 28, 2017. Responses must be received by the new submittal deadline. No further extensions will be granted.**

**Q: An approach is not listed in the Submittal Requirements (items A through E), however, the evaluation criteria include "proposed approach to reach project goals". Is it correct that a proposed approach is not required for each service area sought?**

A: SCP will score proposals based on the listed factors, including a "proposed approach to reach project goals." You may choose to provide an approach for individual items or a more general approach that spans multiple items.

**Q: Are resumes included in the page limit?**

A: Yes, see Section IV: Submittal Requirements.

**Q: The County of Sonoma has a local preference policy for services: (<http://sonomacounty.ca.gov/General-Services/Purchasing/Doing-Business-with-the-County/Local-Preference-Policy-for-Services/>). The SCP JPA includes language promoting the local economy. We don't see reference to a local preference policy for services in the RFQ. Is it something that SCP will add to RFPs? How would the preference be applied?**

A: SCP does not currently have an adopted local preference policy, so no preference will be applied to the selection of firms and individuals responding to this RFQ.

**Q: Do projects with a greater environmental efficiency score higher?**

A: We are unsure what this question means. The focus of this RFQ is on qualifications of responding firms rather than on soliciting detailed program design.

**Q: Does SCP have time-of-day GHG emissions factors?**

A: We do not have measured time-of-day emission factors for SCP's sources at this time. However, high-level data about SCP's portfolio of sources may still be used in the design of programs to emphasize efficiency measures during time periods when more energy is provided from natural gas sources.

**Q: Is there a deadline for submitting questions?**

A: Yes, the deadline for questions was 5:00pm PST on Tuesday, February 6, 2017.

**Q: Will SCP share with all questioners all of the questions received by SCP and all of the responses provided related to this RFQ?**

A: Yes. Answers to questions will be posted online at [sonomacleanpower.org](http://sonomacleanpower.org).

**Q: This morning we saw a public listing of this RFQ that indicated the submittal deadline is 5:00 p.m., February 28, rather than February 21 as indicated in the e-mail below and in the RFQ. Has the deadline been changed, or has an addendum to this RFQ been issued? Any clarification you can provide would be much appreciated.**

A: The deadline for responses is now 5:00 PM Pacific Time on February 28, 2017.

**Q: Would listed individuals be funded to provide services to SCP, or is the intent that they help identify funding opportunities SCP would pursue with their assistance? If both or the latter, would there be compensation for assistance?**

A: In general, SCP's programs will be directly administered by SCP, possibly in partnership with other agencies in some cases. Organizations wishing to provide services to SCP should respond to this RFQ, and it is SCP's expectation that assistance from organizations would generally be compensated.

**Q: I am writing on behalf of a small number of consultants who in turn are networked with individual networks that include many others having diverse and more specialized experience and expertise. It is unlikely that the consultants and their network contacts would all or mostly respond to the solicitation, so there is a question whether SCP would want or prefer to contract with a company willing to provide coordination, sub-contracting and integration services. Our group is interested in responding individually or collectively depending on client preferences.**

A: A "prime" consultant may respond to the RFQ, but information about each of the subcontractors is required, including basic firm qualifications and key staff.

**Q: There is a basic question whether to interpret the term assistance narrowly or broadly, in other words whether it is a call for special technical expertise on fuel switching and ZNE buildings, or, to the extent these are inherently integrative purposes, all of the more specialized topics, e.g. including the elements of an economically optimized net zero building design or retrofit package.**

A: Either approach is welcome, but please be clear about which kind of qualifications you are presenting.

**Q: It is understood that work may be performed at any or no time over a three-year period. The individual or firm would need to plan and allocate resources with some guidance from SCP. How would that guidance be provided? Would initial work start in the first year, or is the start date indeterminate at this time?**

A: The successful individuals and firms selected in response to this RFQ will form the pool of bidders for specific scopes of work. Timelines, contract value and task orders would be established at that time in advance of any commitments for work.

**Q: Work in these service categories would need to be done based on a clear understanding of applicable company and state policies and with an eye to local economic impacts and benefits as well as benefits to SCP rate competitiveness. Does SCP engage other firms and individuals for related assistance or does it internally source the assistance? More generally, is there interest in retaining firms and individuals active in local energy resource development more generally, who are also conversant and skilled in integrative deployment work at the building, neighborhood and community level? In other words, is there interest in capabilities not specified in any one of the six categories but relevant to all?**

A: Qualifications that span the individual categories are welcome, but please indicate which categories are at least partially covered. Any qualifications for scope outside of the RFQ will not contribute toward selection in this process.

**Q: If successful respondents are intended to have primarily grant writing expertise, would they be directed and employed to support other listed individuals and firms in the preparation of grant proposals submitted by SCP?**

A: Yes, services may be requested from a firm that specializes in grant writing to obtain funding for program implementation which SCP would use to contract with another firm to provide.

**Q: Submit hard Copies and e-mail? Are both required? Preference? If require both, deadline same for e-mail and Hard Copy?**

A: See Section V. Application Deadline and Instructions: One copy of the proposal should be emailed (preferred), or mailed or hand delivered to: Sonoma Clean Power, 50 Santa Rosa Avenue, 5th floor, Santa Rosa, 95404, Attention: Jan McFarland, Director of Programs. Faxed responses will not be accepted.

**Q: Second reference to Exhibit A?**

A: Exhibit A specifies scope of work for each professional services contract, and will be provided once a firm is selected for specific work.

**Q: Is the 1/10hr increments necessary? In many cases, it's impractical or unrealistic. Any options for, at a minimum, 1/4hr or 1/2hr?**

A: SCP will accept 1/4-hour increments of time.

**Q: What is the anticipated date for each term of Agreement?**

A: After interviews, successfully selected firms from this RFQ will be offered general agreements to execute within 90 days of the response submittal date. Specific task orders with contract limits and scopes of work will be offered at any time during the period running through June 30, 2020, depending on need.

**Q: What's the likelihood the SCPA Board of Directors will approve (or not approve) a contract? Directors?**

A: SCPA's Board relies significantly on the advice of SCP's staff and Community Advisory Committee and generally approves contracts which have already been vetted. The Board may also choose to reject a contract, however that has not occurred to date.

**Q: Indemnification, is very broad, does it include any person or entity, it directly relates to?**

A: If you have questions about the meaning of the indemnity provision, we encourage you to seek advice from an attorney, insurance broker, or other professional.

**Q: Professional liability provisions are extraneous and expensive. No professional licenses required, so no need to required E&O?**

A. SCP may waive professional liability insurance requirements for some services when those services do not require a license and do not involve providing advice where significant liability risk is involved.

**Q: Confidentiality, Ownership and Disclosure of Work Product is broad, information marked or identified as confidential, exemptions and limitations needed. Should be related to direct project activities and/or funding. Could have conflicts between this and SCE for instance?**

A. Work performed outside of this contract is not subject to SCP's confidentiality, ownership and disclosure requirements.

**Q: Does SCP see any value in firms partnering with others in order to provide a broader scope of services? Since the scope of what you are trying to accomplish is quite broad based and will be beyond the capabilities of any one firm, but coordination between the various efforts is clearly going to be critical, the solicitation would seem lend itself to team submissions. However, the way that it is written seems to imply that firms should only submit responses for those items that the particular firm has the direct expertise in.**

A: Partnering with other firms may provide value to proposals. SCP will also accept proposals on a subset of tasks.

**Q: Is there any rough estimate that you can provide as to number of hours you anticipate or budget that you have available for either the specific service categories (preferable) or the entire scope?**

A: One of the first tasks will be to design the program and allocate an appropriate budget over time. SCP is likely to spend around \$2 to \$5 million per year on all programs, with a portion going toward ZEB and end-use fuel switching efforts. In addition, CPUC funding may be available for this purpose, CEC and other public and private funding may also add to these amounts.

**Q: Is there any plan to implement a program under the 3 year period specified in the RFQ, or is this strictly for planning of the implementation of a program that will actually occur at some point beyond the 3 year contract period?**

A: An initial ZEB end-use fuel switching program, or series of pilots, will be designed within the initial 3-year period. We have flexibility, we may choose to take a serial pilot approach or develop a comprehensive program. This RFQ is designed to help us find individuals and firms that can help us design, implement and evaluate a ZEB and end-use fuel switching program.

**Q: Would firms that are selected to work on Category 3 (Program Design and Implementation) be eligible to implement the program?**

A: Individuals or firms that are selected to work on program design cannot be retained for implementation of the same program. But a firm designing one program may bid on implementation of another unrelated program.

**Q: Will SCP actually take proposal from individuals with specific expertise in some – but not all - the tasks - or is it more realistic that you will look for a team covering all tasks? In other words, are you really willing to engage and manage contacts with more than a single primary contractor?**

A: Yes, SCP will accept proposals on a subset of the tasks.

**Q: Within a team, some sub-consultants could face "zero-hour" contracts. Will SCP allow sub-contractors to trigger insurance coverage only after notice is given to proceed with a specific work order?**

A: Yes, insurance requirements can be satisfied following a task order with funding.

**Q: Tasks A, B, and F will be far more effective and relevant to SCP if the consultant has access to customer data (anonymized), hourly service area (and even sub-station) power demands, and wholesale procurement charges. Are you considering such access - and beyond the confidentiality clause in the RFQ - are additional security clearances needed?**

A: No special security clearance is required, but some activity may benefit from use of customer energy data, which will require signing a non-disclosure agreement in

substantially the same form as the NDA required by PG&E for work on customer accounts.