

Clean Energy Alliance

JOINT POWERS AUTHORITY

REQUEST FOR QUALIFICATIONS

RFQ # 2020-002

Professional Services from Qualified Firms for Community Choice Aggregation Technical Consultant

Date of Issuance: January 21, 2020

SUBMITTALS DUE:

5 P.M. (PST)

Monday, February 10, 2020

CONTACT: BARBARA BOSWELL
INTERIM CHIEF EXECUTIVE OFFICER
CEO@TheCleanEnergyAlliance.org

*THE CLEAN ENERGY ALLIANCE ENCOURAGES THE PARTICIPATION OF MINORITY- AND WOMEN-OWNED
BUSINESSES*

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I. INTRODUCTION & BACKGROUND

The Clean Energy Alliance (CEA) is seeking responses to this Request for Qualifications (RFQ) from qualified firms to provide professional services, filling the duties of community choice aggregation (CCA) technical consultant for CEA.

About CEA

In October 2019, the cities of Carlsbad, Del Mar and Solana Beach formed CEA, a non-profit public entity that will operate a Community Choice Energy (CCE) program within their city limits, in the San Diego Gas & Electric (SDG&E) service territory. CEA's purpose is to be an energy services provider, which benefits the community through the delivery of cleaner and more locally produced electricity, demand reduction, economic investment, and competitive rates for residents, businesses, and municipal facilities in the service territory.

CEA's program will allow participating local governments to pool the electricity demands of their communities in order to increase their purchasing power for higher renewable power content and invest in local energy infrastructure and energy efficiency programs. CEA will be locally controlled and ratepayer supported, with no taxpayer subsidies.

CEA Board of Directors approved its CCA Implementation Plan and Statement of Intent in December 2019, which was subsequently submitted to the California Public Utilities Commission (CPUC) for certification, as part of the process to launch a CCA program in May 2021.

By law, as a Joint Powers Authority (JPA), CEA is a separate legal entity from its member agencies and its budget is completely separate from the general funds of these local governments. Board meetings are open to the public. In addition, CEA will be funded through program reserves.

The service territory of CEA may expand in the future to include additional counties and cities.

II. SCOPE OF REQUIRED SERVICES

As part of the process of implementing a CCA program, CEA has several regulatory compliance requirements that are to be met. They include:

- Renewable Portfolio Standards Procurement Plan
- Integrated Resource Plan
- Year-Ahead Resource Adequacy Process
- Long-Term Renewable Energy Procurement

In addition to the regulatory compliance requirements listed above, CEA is seeking a technical consultant to assist with:

- Development of a financial pro forma model
- Analysis of SDG&E rates and rate related proceedings

Proposers may identify other services or requirements not listed above that would be appropriate to a successful CCA implementation.

The selected firm will work with the CEA Interim Chief Executive Officer and member agency staff team in coordinating with SDG&E for Resource Adequacy and Integrated Resource Plan processes.

The initial term to provide the requested services will be until the end of Fiscal Year (FY) 2019/2020 (June 30, 2020), at which time the Board will consider options for the most optimal and efficient operation of the services. At that time, the Board may choose to extend the consultant services or solicit for a new firm to fulfill the required technical services.

III. QUESTIONS

Questions are to be submitted to Barbara Boswell, Interim CEO, via email to: CEO@TheCleanEnergyAlliance.org, by 5:00pm, January 28, 2020. Responses will be provided via email by January 31, 2020. Proposers wishing to receive copies of questions and responses must submit the request by January 28, 2020 to CEO@TheCleanEnergyAlliance.org.

IV. SUBMITTAL REQUIREMENTS

Submittals should be concise, well-organized and demonstrate the qualifications, experience and approach necessary to provide the required scope of services. Submittals shall include the following items in the order listed:

General qualifications, key personnel & sub-consultants – Submit a general description of your firm’s qualifications to complete the Scope of Required Services, along with the qualifications and specific roles of any sub-consultants to be employed on this project. Summary of qualifications should speak to relevant experience with meeting the CCA regulatory compliance requirements and energy market or utility experience. Include the names and qualifications of the key individuals who will be responsible for delivering these services, their respective roles, and the organizational structure of the team. Include resumes for key individuals who will provide service. Technical support staff should be included if they will perform a significant role in the preparation of the work products. If the firm has multiple offices, the office of record for each team member shall be listed, as well as the primary office location where the work is to be performed.

Experience – Provide summaries of up to three completed service contracts that are similar in scope to the type of services required by CEA. The summaries should include client name, contact information, scope of service, team members, date completed and total (or annual) cost of services. Please specify any experience in the San Diego region including experience working on behalf of public agencies with San Diego Gas and Electric (SDG&E).

References – Provide contact information for three professional references.

Approach – Describe your firm’s proposed approach to the scope of service. Identify the methods to be used in the completion of and/or carrying out the Scope of Required Services. Proposers can include other services deemed relevant to the successful implementation of a CCA program.

Schedule – Include an anticipated schedule for providing the required services. Provide a statement of time commitment by the firm to this scope, justifying the firm’s ability to complete the Scope of Required Services.

Fee schedule – Include the firm’s hourly billing rate fee schedule for all personnel likely to be engaged in completing the tasks described in the Scope of Required Services. Include the scope of work and cost for any sub-consultants proposed for the services, and the approximate percentage of the work (as a percentage of the total scope) to be performed by each sub-consultant.

V. SELECTION

Submittals will be reviewed and ranked by a selection committee composed of the Interim CEO and member agency staff. During the evaluation process, the selection committee and CEA reserve the right to request additional information or clarification from firms responding to this RFQ. All submittals deemed responsive will be evaluated using the following criteria (listed in no particular order of importance or value of rating):

- Best value
- Relevant experience and qualifications of the firm (including experience working in the San Diego region and specifically with SDG&E)
- Proposed services and methodology
- Schedule
- Overall response to the RFQ

Selection will be made by the CEA Board of Directors based upon the firm’s current ability to provide the highest quality of service that meets the requirements and objectives of this RFQ, the needs of CEA, and provide the best value to CEA.

Upon ranking of the submittals based on a review of the selection criteria, the selection committee will present a recommendation to the CEA Board of Directors. Upon selection by the Board, staff will begin negotiations with the selected firm as to the final scope of work, schedule and price. If staff is unable to reach an acceptable agreement with the selected firm, staff will terminate negotiations, and initiate negotiations with the next highest-ranked firm.

This RFQ does not commit CEA to award a contract for any costs incurred in the preparation of the submittal. CEA reserves the right to accept or reject any or all submittals, or any part of a submittal received as a result of this request, to waive minor defects or technicalities, to award multiple contracts, or to solicit new submittals for the same scope of work or a modified scope of work, or to extend, expand, or cancel in part, or its entirety, this RFQ if it is in the best interest of CEA to do so. CEA will not reimburse any of the proposers for their costs to prepare and submit a proposal.

VI. CONDITIONS GOVERNING THIS PROCUREMENT

SCHEDULE

This section of the RFQ provides the anticipated schedule for the solicitation and describes the events and the conditions governing the procurement. CEA will make every effort to adhere to the anticipated schedule below:

Issue RFQ	January 21, 2020
Deadline for written questions to be submitted (email)...	January 28, 2020 5:00 pm PST
Responses to written questions (email).....	January 31, 2020

Submittal due date February 10, 2020 5:00 pm PST
Evaluate Proposals (oral interviews if needed) February 10 – 14, 2020
Results to Board for Selection February 20, 2020

General Covenants

Rights of CEA

This RFQ does not commit CEA to award, nor does it commit CEA to pay any cost incurred in the submission of the proposal, or in making necessary studies or designs for the preparation thereof, nor procure or contract for services or supplies. Further, no reimbursable cost may be incurred in anticipation of a contract award.

CEA reserves the right to reject any and all proposals, to waive any minor irregularities in a proposal, to request clarifications or additional information from an institution, and to reject any agreement deemed by CEA to be in its best interest with one or more institutions.

Claims against CEA

Neither your organization nor any of your representatives shall have any claims whatsoever against CEA, or any of its respective officials, agents, or employees arising out of or relating to this RFQ or these RFQ procedures, except as set forth in the terms of a definitive agreement between CEA and your organization.

Form of Proposals

Electronic proposals only will be accepted.

Amended Proposal

Proposers may submit amended proposals before the Deadline to Submit Proposals. Such amended proposals must be complete replacements for previously submitted proposals and must be clearly identified in a written format. CEA will not merge, collate, or assemble proposal materials.

Withdrawal of Proposal

Proposers may withdraw their proposals at any time prior to the Deadline to Submit Proposals. The proposer must submit a written withdrawal request signed by the proposer's duly authorized representative addressed to and submitted to the Contact.

Late Responses

To be considered, proposals must be received via email by February 20, 2020, 5:00 PM PST.

No Public Proposal Opening

There will be no public opening for this RFQ.

Public Records Act (CPRA)

Please note that any information provided as part of a submittal in response to the RFQ may be subject to the Public Records Act (PRA). If the Proposer feels that any part of its submission is proprietary information, please identify by section, paragraph, and page the information the Proposer believes is proprietary. In the event of a PRA, this information may be reviewed by CEA's attorneys for applicability. No guarantee can be provided that any part of the Proposer's information will be kept confidential.

Confidentiality

All data and information obtained from or on behalf of CEA by the Proposer and its agents in this RFQ process, including reports, recommendations, specifications, and data, shall be treated by the Proposer and its agents as confidential. The Proposer and its agents shall not disclose or communicate this information to a third party or use it in advertising, publicity, propaganda, or in another job or jobs, unless written consent is obtained from CEA. Generally, each proposal and all documentation, including financial information, submitted by a Proposer to CEA is confidential until a contract is awarded, when such documents become public record under State and local law, unless exempted under PRA.

VII. BILLING & EXPENSES

Firms shall propose a project budget, which identifies deliverables, and work hours estimated for the completion of each deliverable. Firms shall provide a schedule of hourly rates of personnel used in this agreement. The fee proposal must be received by 5:00 PM on February 10, 2020.

VIII. SUBMITTAL & REVIEW

Firms must submit required materials no later than 5:00 PM on February 10, 2020, via email to CEO@TheCleanEnergyAlliance.org. Please title the email in the subject field as "CEA CCA Technical Consultant". Submittals received after the specified time will not be considered and will be returned to the responding firm.

For additional information, please contact Barbara Boswell, Interim Chief Executive Officer, Clean Energy Alliance by email at CEO@TheCleanEnergyAlliance.org.

IX. EQUAL OPPORTUNITY

CEA requires all proposers to comply with equal opportunity policies. CEA's contracts are open to all persons without regard to race, religion, color, national origin, sex, age, marital status, handicap, or political affiliation.

Thank you for your interest, and we look forward to reviewing your submittal.