

Request for Proposals

Technical Support and Training for Electricity Supply Analysis



RFP-13-801

www.energy.ca.gov/contracts/

State of California

California Energy Commission

July, 2013

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Attachments

- 1 Contractor Status Form
- 2 Darfur Contracting Act
- 3.1 Certified Small/micro Business, Non-small Business and DVBE Certification Instructions
- 3.2 Disabled Veteran Business Enterprise Program Requirements
- 3.3 DVBE Std. 843
- 3.4 Bidder Declaration form GSPD-05-105
- 4 Contractor Certification Clauses
- 5 Client References
- 6 Sample Standard Agreement
- 7 Budget Forms

I. Introduction

BACKGROUND

In accordance with §25000 et. seq. of the Public Resources Code, the Energy Commission is required to conduct assessments and forecasts of all aspects of energy industry supply, production, transportation, delivery and distribution, demand, and prices. The Energy Commission uses these assessments and forecasts to develop energy policies that conserve resources, protect the environment, ensure energy reliability, enhance the state's economy, and protect public health and safety.

The Energy Commission is also required to provide information about the performance of energy industries, develop and maintain the analytical capability sufficient to answer inquiries about energy issues from government, market participants, and the public, analyze and develop energy policies, provide an analytical foundation for regulatory and policy decision making, and facilitate efficient and reliable energy markets.

PURPOSE OF RFP

The purpose of this Request for Proposals is to select an experienced, full-service Prime Contractor with particular strengths in the technical, administrative and project management aspects of energy analytical methods, and in program management of the subcontractor team. The (Prime and Subcontractors) team will provide technical assistance to the Electricity Supply Analysis Division. This includes transmission upgrade and generation system analysis, refinement of electricity demand forecasting methodologies, refinement of analytical methods to evaluate utilities' resource portfolios, assessment of the analytical methods used to prepare year-ahead electricity load forecasts, assisting staff in the evaluation of natural gas market parameters, and assisting staff in evaluating central station and distributed generation market.

KEY ACTIVITIES AND DATES

Key activities including dates and times for this RFP are presented below. An addendum will be released if the dates change for the asterisked (*) activities.

ACTIVITY	ACTION DATE
RFP Release	July 26, 2013
Deadline for Written Questions *	August 9, 2013
Pre-Bid Conference *	August 9, 2013
Distribute Questions/Answers and Addenda (if any) to RFP	August 13, 2013
Deadline to Submit Proposals by 3:00 p.m. *	September 3, 2013
Clarification Interviews (If necessary)	September 5 & 6, 2013
Notice of Proposed Award	September 10, 2013
Commission Business Meeting	October 9, 2013
Contract Start Date	November 1, 2013
Contract Termination Date	March 31, 2017

AVAILABLE FUNDING AND HOW AWARD IS DETERMINED

There is a maximum of up to \$3,000,000 available for the contract resulting from this RFP. This is an hourly rate plus cost reimbursement contract and the award will be made to the responsible Bidder receiving the highest points.

Optional when more than one FY funding will be used:

Of this amount \$1,000,000 is immediately available. The remaining balance of \$1,000,000 from fiscal year (FY) 2014/2015 and \$1,000,000 from fiscal year (FY) 2015/2016 may be available contingent upon approval of the Energy Commission's (FY) 2014 and 2015 Budget. Funding shall be subject to the appropriation and availability for that purpose in the (FY) 2014 and 2015 Governor's Budget. In the event funds are not available, the Commission shall have no further liability with regard to the agreement.

The Commission reserves the right to reduce the contract amount to an amount deemed appropriate in the event the budgeted funds do not provide full funding of Commission contracts. In this event, the Contractor and Commission Agreement Manager (CAM) shall meet and reach agreement on a reduced scope of work commensurate with the level of available funding.

ELIGIBLE BIDDERS

This solicitation is restricted to private entities, including non-profit organizations and private universities, and any public entity that can meet the requirements of this solicitation (e.g., Disabled Veteran Business Enterprise participation) and agree to the attached terms and conditions that will be included in the resulting agreement(s). Even if public entities cannot meet these requirements or agree to the terms, they can still participate as subcontractors.

The reason for this distinction is that the Department of General Services, which has oversight of state contracting, no longer allows the Energy Commission to include different terms and conditions within the same solicitation. The Energy Commission used to do this because some public entities cannot agree to the same terms and conditions that apply to private entities. Every entity that bids under this solicitation must meet the solicitations requirements and must agree to the terms and conditions included. The Energy Commission will not award contracts to non-complying entities.

PRE-BID CONFERENCE

There will be one Pre-Bid Conference; participation in this meeting is optional but encouraged. The Pre-Bid Conference will be held at the date, time and location listed below. Please call (916) 654-4381 or refer to the Energy Commission's website at www.energy.ca.gov to confirm the date and time.

August 9, 2013

10 AM
California Energy Commission
Hearing Room B
1516 9th Street
Sacramento, CA 95814
Telephone: (916) 654-4381

PARTICIPATION THROUGH WEBEX

For participation through WebEx, the Energy Commission's on-line meeting service, follow the instructions below:

COMPUTER LOGON WITH A DIRECT PHONE NUMBER:

- * Please go to <https://energy.webex.com> and enter the unique meeting number 922 301 899
- * When prompted, enter your information and the following meeting password: meeting@10
- * After you login, a prompt will appear on-screen for you to provide your phone number. In the Number box, type your area code and phone number and click OK to receive a call back on your phone for the audio of the meeting. International callers can use the "Country/Region" button to help make their connection.

COMPUTER LOGON FOR CALLERS WITH AN EXTENSION PHONE NUMBER, ETC.:

- * Please go to <https://energy.webex.com> and enter the unique meeting number: 922 301 899
- * When prompted, enter your information and the following meeting password: meeting@10

- * After you login, a prompt will ask for your phone number. CLICK CANCEL.
- * Instead call 1-866-469-3239 (toll-free in the U.S. and Canada). When prompted, enter the meeting number above and your unique Attendee ID number which is listed in the top left area of your screen after you login. International callers can dial in using the "Show all global call-in numbers" link (also in the top left area).

TELEPHONE ONLY (NO COMPUTER ACCESS):

- * Call 1-866-469-3239 (toll-free in the U.S. and Canada) and when prompted enter the unique meeting number above. International callers can select their number from:
<https://energy.webex.com/energy/globalcallin.php>

If you have difficulty joining the meeting, please call the WebEx Technical Support number at 1-866-229-3239. Please be aware that the meeting's WebEx audio and on-screen activity may be recorded.

QUESTIONS

During the RFP process, questions of clarification about this RFP must be directed to the Contracts Officer listed in the following section. You may ask questions at the Pre-Bid Conference, and you may submit written questions via mail, electronic mail, and by FAX. However, all technical questions must be received by 5:00 pm on the day of the Pre-Bid Conference.

Approximately two weeks after the Pre-Bid Conference, question and answer sets will be mailed to all parties who requested a copy of this RFP from the Commission Contracts Office and to all who attended the Pre-Bid conference and provided their contact information on the sign-in sheet. The questions and answers will also be posted on the Commission's website at: <http://www.energy.ca.gov/contracts/index.html>.

Any verbal communication with a Commission employee concerning this RFP is not binding on the State and shall in no way alter a specification, term, or condition of the RFP. Therefore, all communication should be directed in writing to the Energy Commission's Contract Officer assigned to the RFP.

CONTACT INFORMATION

Albert De León, Contracts Officer
California Energy Commission
1516 Ninth Street, MS-18
Sacramento, California 95814
Telephone: (916) 654-4299
FAX: (916) 654-4423
E-mail: albert.deleon@energy.ca.gov

RESPONSES TO THIS RFP

Responses to this solicitation shall be in the form of a Technical and Cost Proposal according to the format described in this RFP. The Technical Proposal shall document the Bidder's approach, experience, qualifications, and project organization to perform the tasks described in the Scope of Work, and the Cost Proposal shall detail the Bidder's budget to perform such tasks.

REFERENCE DOCUMENTS

Bidders responding to this RFP may want to familiarize themselves with the following documents:

California Energy Commission, 2011, *2011 Integrated Energy Policy Report*, Publication Number: CEC-100-2011-001-CMF. At:

<http://www.energy.ca.gov/2011publications/CEC-100-2011-001/CEC-100-2011-001-CMF.pdf>

California Energy Commission, 2012, *2012 Integrated Energy Policy Report*, Publication Number: CEC-100-2012-001-CMF. At:

<http://www.energy.ca.gov/2012publications/CEC-100-2012-001/CEC-100-2012-001-CMF.pdf>

All above reference documents are on display and available for review in the Energy Commission's Library. Library hours are Monday - Friday from 8:30 a.m. to 4:30 p.m., closed for lunch 12:00-1:00p.m. The Library is located at: California Energy Commission, 1516 Ninth Street, MS-10, Sacramento, CA 95814, (916) 654-4292.

II. Scope of Work and Deliverables

ABOUT THIS SECTION

This section describes the contract scope of work, deliverables and due dates under the direction of the CAM.

BACKGROUND/PROBLEM STATEMENT

The Energy Commission is responsible for developing energy policies that conserve resources, protect the environment, ensure energy reliability, enhance the State's economy and protect public health and safety. The Energy Commission contributes to this core mission by performing the following on-going activities:

- Collecting demand forecasts, resource plans, market assessments and related outlooks from electric and natural gas utilities, and other market participants,
- Providing information and assessments regarding the adequacy of energy infrastructure, the performance of energy industries, and the future demand and prices for electricity and natural gas.
- Developing and maintaining the analytical capability to answer queries about energy issues,
- Analyzing and developing energy policies,
- Providing an analytical foundation for regulatory and policy decision making,
- Consulting with the appropriate state agencies including the Public Utilities Commission (CPUC), CPUC's Office of Ratepayer Advocates, Air Resources Board (ARB), Electricity Oversight Board, Independent System Operator, and the Department of Water Resources, and
- Consulting with the appropriate federal agencies including the Department of Energy, Western Area Power Administration, Bonneville Power Administration, and the Western Electricity Coordinating Council.

The Integrated Energy Policy Report (IEPR) includes an assessment and forecast of energy system reliability, the need for resource additions, efficiency, and conservation that considers all aspects of energy industries and markets that are essential for the state economy, general welfare, public health and safety, energy diversity, and protection of the environment.

In addition to the IEPR documents, the Energy Commission may also prepare analyses and assessments of energy issues and concerns to provide timely and relevant information for the Governor, the Legislature, energy market participants and the public.

GENERAL REQUIREMENTS OR GOALS AND OBJECTIVES

The goal of this agreement is to obtain expert technical support services for the Electricity Supply Analysis Division in the areas of analysis, forecasting, and assessment of electricity and natural gas systems and markets, and other areas and offices as directed by the Energy Commission Executive Director.

This is a "Work Authorization" Contract and no work shall be undertaken unless authorized by the Energy Commission through a specific written document called a Work Authorization (WA). A WA specifying the tasks, deliverables and costs shall be used for all work assignments. WA for technical tasks will be made on an as-needed basis. The specific task(s) and the degree of effort for each task will vary from project to project. Written authorization must be obtained from the Energy Commission Agreement Manager (CAM) before work can begin on any WA. Workflow will depend on demand for service. Demand is uncertain and, therefore, there will be no guarantee of work for the prime contractor or any subcontractor.

The Contractor shall provide technical assistance for the following tasks, as directed by the CAM through properly executed WA's.

TASK LIST

Task #	Task Name
1	Agreement Management
2	Electricity System and Infrastructure Analysis
3	Improve Demand Forecasting Methods
4	Improve Energy Demand Analyses
5	Natural Gas Assessment and Forecasting
6	Central Station and Distributed Generation Market Assessment and Analysis
7	Distribution System and Distributed Generation Assessment and Analysis
8	Development of Preferred Distributed Renewable Energy Development Zones

ACRONYMS/GLOSSARY

Specific acronyms and terms used throughout this scope of work are defined as follows:

Acronym	Definition
ARB	Air Resources Board
CAM	Commission Agreement Manager
CHP	Combined Heating and Power
CPUC	California Public Utilities Commission
DAWG	Demand Analysis Working Group
EM&V	Evaluation, Measurement, and Verification
IEPR	Integrated Energy Policy Report
LNG	Liquefied Natural Gas
SCIT	Southern California Import Transmission
WA	Work Authorization
CAISO	California Independent System Operator

FORMAT/REPORTING REQUIREMENTS

Deliverables/Reports

When creating reports, the Contractor shall use and follow, unless otherwise instructed in writing by the Commission Agreement Manager (CAM), the latest version of the Consultant Reports Style Manual published on the Energy Commission's web site:

http://www.energy.ca.gov/contracts/consultant_reports/index.html

Each final deliverable shall be delivered as one original, reproducible, 8 ½" by 11", camera-ready master in black ink. Illustrations and graphs shall be sized to fit an 8 ½" by 11" page and readable if printed in black and white.

Electronic File Format

The Contractor shall deliver an electronic copy (CD ROM or memory stick or as otherwise specified by the CAM) of the full text in a compatible version of Microsoft Word (.doc).

The following describes the accepted formats of electronic data and documents provided to the Energy Commission as contract deliverables and establishes the computer platforms, operating systems and software versions that will be required to review and approve all software deliverables.

- Data sets shall be in Microsoft (MS) Access or MS Excel file format.
- PC-based text documents shall be in MS Word file format.
- Documents intended for public distribution shall be in PDF file format, with the native file format provided as well.
- Project management documents shall be in MS Project file format.

Software Application Development

If this scope of work includes any software application development, including but not limited to databases, websites, models, or modeling tools, contractor shall utilize the following standard Application Architecture components in compatible versions:

- Microsoft ASP.NET framework (version 3.5 and up) Recommend 4.0
- Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5
- Visual Studio.NET (version 2008 and up) Recommend 2010
- C# Programming Language with Presentation (UI), Business Object and Data Layers
- SQL (Structured Query Language)
- Microsoft SQL Server 2008, Stored Procedures Recommend 2008 R2
- Microsoft SQL Reporting Services Recommend 2008 R2
- XML (external interfaces)

Any exceptions to the Software Application Development requirements above must be approved in writing by the Energy Commission Information Technology Services Branch.

TASK 1- AGREEMENT MANAGEMENT

TASK 1.1 KICK-OFF MEETING

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement.

The Contractor shall:

- Attend a “kick-off” meeting with the CAM, the Contracts Officer, and a representative of the Accounting Office. The meeting will be held in Sacramento, CA and the CAM will designate the specific location. The Contractor shall include their Project Manager, Contracts Administrator, Accounting Officer, and others designated by the CAM in this meeting. The administrative and technical aspects of this Agreement will be discussed at the meeting.
- If necessary, prepare an updated Schedule of Deliverables based on the decisions made in the kick-off meeting.

The CAM shall:

- Arrange the meeting including scheduling the date and time.
- Provide an agenda to all potential meeting participants prior to the kick-off meeting.

Deliverables:

- An Updated Schedule of Deliverables (if applicable)

TASK 1.2 INVOICES

The Contractor shall:

- Prepare invoices for all reimbursable expenses incurred performing work under this Agreement in compliance with the Exhibit B of the Terms and Conditions of the Agreement. Invoices shall be submitted with the same frequency as progress reports (task 1.4). Invoices must be submitted to the Energy Commission’s Accounting Office.

Deliverables:

- Invoices

TASK 1.3 MANAGE SUBCONTRACTORS

The goal of this task is to ensure quality products, to enforce subcontractor Agreement provisions, and in the event of failure of the subcontractor to satisfactorily perform services, recommend solution to resolve the problem.

The Contractor shall:

- Manage and coordinate subcontractor activities. The Contractor is responsible for the quality of all subcontractor work and the Energy Commission will assign all work to the Contractor. If the Contractor decides to add new subcontractors, they shall 1) comply with the Terms and Conditions of the Agreement, and 2) notify the CAM who will follow the Energy Commission’s process for adding or replacing subcontractors.

TASK 1.4 PROGRESS REPORTS

The goal of this task is to periodically verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement.

The Contractor shall:

- Prepare progress reports which summarize all Agreement activities conducted by the Contractor for the reporting period, including an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Each progress report is due within 15 calendar days after the end of the reporting period. The CAM will provide the format for the progress reports.

Deliverables:

- Monthly Progress Reports

TASK 1.5 FINAL REPORT

The goal of this task is to prepare a comprehensive written Final Report that describes the original purpose, approach, results and conclusions of the work completed under this Agreement. The Final Report shall be prepared in language easily understood by the public or layperson with a limited technical background.

The Final Report must be completed before the termination date of the Agreement in accordance with the Schedule of Deliverables.

The Final Report shall be a public document. If the Contractor has obtained confidential status from the Energy Commission and will be preparing both a public and a confidential version of the Final Report, the Contractor shall perform the following subtasks for both the public and confidential versions of the Final Report.

TECHNICAL TASKS

TASK 2 ELECTRICITY SYSTEM AND INFRASTRUCTURE ANALYSIS

The goal of this task is to obtain a range of analytical studies in the field of electric transmission, distribution and generation system analysis, planning and regulation. These assignments will be varied, complex, and technical, including engineering and economic studies related to integrated transmission, distribution and generation reliability issues. [The following sub-tasks are divided into core electricity system topic areas.]

Generation & Transmission System Assessment

At the direction of the CAM through a properly executed Work Authorization, the Contractor shall:

- 2.1. Conduct analysis of local capacity area capacity requirements within the CAISO annually over a 10, 15 and 20-year time frame under alternative energy demand, power plant retirement/development, and transmission system upgrade scenarios. Contractor shall acquire, or if not available, develop power flow base and transient stability base cases and prepare analyses of scenario variants to a base case using power flow and transient stability techniques equivalent to those prepared by the CAISO. Contractor should be prepared to address comparable analytic work for publicly-owned balancing authority areas operating systems in parallel with the CAISO.
- 2.2. Undertake analyses of the feasibility and costs of reducing power plant capacity that currently must be located in the immediate coastal zone of Southern California. Feasibility shall examine the impacts of upgrades to transmission system elements (line rating increases through reconductoring, upgraded substations, additional interconnections between substations, developing reactive power elements that can substitute for power plant inertia, etc.). For feasible upgrades, contractor shall develop preliminary cost estimates of comparable certainty to industry-standard cost of generation assessments to allow initial tradeoff analyses.
- 2.3. Develop an analysis that illustrates the tradeoffs between imports into Southern California versus internal capacity that must be on line and available to assure system stability under generator and transmission contingencies, including variable energy resources and energy storage. It is expected that this analysis would resemble conversion of the seasonal Southern California Import Transmission (SCIT) Nomogram from the operating time horizon to the planning time horizon in order to guide development of power plant configurations and locations necessary to support system stability under one or more transmission system development patterns.
- 2.4. Provide technical assistance for studying the implications of the development of specific bulk transmission projects, both planned and conceptual, for the integration of new renewable resources, the need for local capacity in transmission-constrained areas, energy storage and the ability to import energy from and rely upon generation capacity in neighboring states.

- 2.5. Provide technical assistance for evaluating the need for transmission system upgrades to meet the state's environmental policy goals and ensure reliable service under different scenarios regarding future load-growth, impacts of demand-side programs (energy efficiency, demand response), energy storage, renewable and fossil generation resource development., and new grid management techniques for managing variable energy resources.
- 2.6. Identify, assess, and make recommendations regarding the feasibility of improvements in modeling techniques and data acquisition related to electricity system integration including, but not limited to, integration of intermittent renewables with "must take" provisions thus influencing how the balance of the system resources must be dispatched, dispatch of use-limited resources like hydro-electric generation or demand response programs, and distributed generation not visible to the system operator. This can include modifications to existing modeling techniques (e.g. – production cost models) or the applicability of new modeling techniques (e.g. – power flow studies).
- 2.7. Collaborate with Energy Commission's staff to define policy relevant scenarios compatible with modeling techniques and availability of data, and assist Energy Commission's staff to translate the general concepts of the new scenarios/cases into simulation models and risk analysis datasets.
- 2.8. Collaborate with Energy Commission's staff to identify, test and correct data inputs to production cost models currently used for the Energy Commission's system studies (Plexos), including the ability of translating other production cost model data sets (PROMOD, Gridview,etc.) to a Plexos format in order to improve simulation studies.
- 2.9. Assist in the development of in-house tools for compiling, analyzing, and presenting data, including but not limited to hourly data on generation, electrical loads, and transmission flows. Provide technical support for the development of spreadsheet- and programming-based tools designed to facilitate the compilation and representation of data in useful formats, and summarize said data both statistically and graphically. Develop interfaces which facilitate ease of use.
- 2.10. Evaluate, develop, design, and assist with the implementation of a data management system and data center structure to organize and manage electricity supply and demand data. The desired system will incorporate data collection, data housing, and data dissemination incorporating measures to ensure data confidentiality and security are adequately addressed. Evaluate and develop appropriate security protocols for the data collection efforts together with the Energy Commission emphasizing the importance of confidentiality in the handling of protected and sensitive data.
- 2.11. Perform an assessment of implementing a consistent, standardized, comprehensive, streamlined, cost-effective, and well-protected data management system for statewide utility data to assist with the development of forecasting related activities. The assessment will include analyses supporting the development of a Feasibility Study Report.
- 2.12. Provide technical assistance on evaluating the variability and other uncertainties affecting the availability of hydro-generation and how hydro dispatch may change to accommodate intermittent renewable generation, San Francisco Bay Area and Delta water quality regulation changes associated with biological requirements for the water systems and potential long-term climate change implications.

- 2.13. Assist staff in evaluating and weighing the various sources of uncertainty that will affect integration of higher levels of renewables into the California and Western grid.
- 2.14. Provide technical support to implement exploratory modeling and other risk assessment techniques in conducting resource planning and policy decision support for the electricity and natural gas systems. Assist in development of low resolution models, meta-models, sampling techniques and other tools necessary to conduct exploratory modeling, interpret results and present results and findings in easily understandable graphics and formats.
- 2.15. Provide technical support to analyze the role of coal in the California and western electricity market, particularly under what conditions and how much coal power is sold into California's unspecified imports market. Identify potential methodologies for estimating the role of coal in the electricity market. If methodologies are viable, conduct analysis and studies.
- 2.16. Provide assessment of current and projected coal fuel costs for individual power plants in the west, differences between long term contract cost provisions and short-term market prices, related delivery costs, cost differentials with other fuels that may induce plant closures or fuel switching decisions, and other variables that may affect coal plant costs and wholesale electricity prices.
- 2.17. Provide technical assistance in updating California generation unit emission factors and developing emission factor sub models for the criteria pollutants pursuant to the federal Clean Air Act for fossil generating facilities that are responsive to alternative duty cycle predictions from production simulation models, e.g. numbers of hot and cold starts/stops, part or full load dispatch, response to AGC or load following instructions from a system operator and other relevant drivers of emissions.
- 2.18. Provide analysis on the planning implications of large amounts of generation (e.g. solar, wind, etc.) or transmission resources that could have potential to shift peak or critical periods. The analysis will investigate mitigation steps that can be taken and alternatives to additional capacity.

Distribution System Planning

At the direction of the CAM through a properly executed Work Authorization, the Contractor shall:

- 2.19. Provide technical support for analysis of the costs, economics, operating characteristics, regulation/incentives, and other factors which influence deployment and impact of distributed generation technologies.
- 2.20. Provide technical support for evaluating the upgrades to the distribution system and changes in distribution engineering practices or inter-connection requirements needed to incorporate high levels of distributed generation into the electricity system.
- 2.21. Provide technical support for evaluating smart grid technologies, including but not limited to; distribution automation, analysis, methodologies, and inverters, which enable distribution system infrastructure modernization and distributed energy resource penetration.

TASK 3 IMPROVE DEMAND FORECASTING METHODS

The goal of this task is to obtain technical assistance in the preparation of, and recommendations for the improvement of, both year-ahead forecasts of monthly peak demand and longer-term forecasts of annual peak and energy demand.

At the direction of the CAM through a properly executed Work Authorization, the Contractor shall:

- 3.1. Identify and assess various peak demand forecasting methodologies and techniques currently being used by other industry and academic experts to forecast electricity peak demand.
- 3.2. Identify methods to improve the usefulness of staff peak demand forecasting methods, and implement those methods.
- 3.3. Provide recommendations for new energy demand forecasting models and identify ways to improve the usefulness of staff energy demand forecasting methods, and implement those methods. This potentially includes separate projects for individual sectors, including:
 - o Residential
 - o Commercial
 - o Industrial
 - o Agricultural
 - o Other
- 3.4. Transfer sector models to improved platforms.
- 3.5. Provide analysis of information gathered during energy end use survey and develop inputs to the forecasting models from new residential and commercial survey results.
- 3.6. Provide analysis and data collection in support of efforts related to building and appliance standards, energy efficiency and demand side programs and energy demand. Within this context, develop mechanisms and identify data sources for generating hourly load profiles by customer class. Provide the capability of disaggregating hourly loads by factors such as end uses, energy efficiency measures, demand response participation and self generation. Provide analysis capabilities that can capture consumption changes due to economic and behavioral conditions. Provide scenarios of impacts of photovoltaics and other demand side measures on customer load shapes.

TASK 4 IMPROVE ENERGY DEMAND ANALYSES

The goal of this task is to obtain technical assistance and recommendations related to other analyses conducted in the Demand Analysis Office that are not directly related to energy demand forecast methods.

At the direction of the CAM through a properly executed Work Authorization, the Contractor shall:

- 4.1. Provide analytical support for sensitivity analysis and exploratory modeling to identify key uncertainties regarding customer demand and resources. Provide recommendations and strategies to incorporate uncertainty analysis and risk assessments into the forecasting process through meta-modeling and other analytical techniques.
- 4.2. Identify, assess, and implement behavioral methodologies to forecast adoption of efficiency measures and demand response participation.
- 4.3. Develop a forecasting methodology for commercial sector adoption of electricity self-generation technologies, including photovoltaic systems.
- 4.4. Provide review and analyses of publicly owned utility evaluation, measurement, and verification (EM&V) studies in support of AB 2021 efficiency goals. Provide training where needed for the publicly owned utilities in conducting these studies. Develop and implement strategies for EM&V collaboration among utilities. Provide review and analysis of POU yearly efficiency progress report and target setting studies.
- 4.5. Provide coordination and other support for activities involving the Demand Analysis Office and outside agencies, including the Demand Analysis Working Group (DAWG).
- 4.6. Develop recommendations for further disaggregation of Energy Commission demand forecasts. Identify the level of geographic disaggregation that can be supported, given availability of utility customer data, economic-demographic historical and forecast data, efficiency program and self-generation data, and other required inputs. Provide recommendations for modifying Energy Commission models to have the capability to forecast at higher levels of disaggregation and assist staff in implementing these recommendations. Assist staff in developing existing and projected hourly load shapes for different geographic zones throughout the Western Electricity Coordinating Council region.
- 4.7. Identify and assist staff in implementing methods to further incorporate climate change in Energy Commission demand forecasts within the agricultural and water pumping sectors, the industrial sector, and the municipal and state government sectors. Provide analysis of climate change impacts on temperatures and temperature variability at the regional level.
- 4.8. Provide analysis on current and forecasted efficiency programs of California utilities, a breakdown of the hourly, daily and seasonal demand reductions from different programs types and their impacts on state energy consumption.

- 4.9. Provide analysis on and evaluation of methodologies to determine energy efficiency potential and establish goals of California utilities and other entities supplying efficiency services.
- 4.10. Develop a retail electricity and natural gas price forecasting methodology for residential, commercial and industrial sectors incorporating input variables used in developing the electricity demand forecast.
- 4.11. Provide analysis on different electricity rate structures that may encourage consumer investments in load reduction, storage or distributed generation technologies.
- 4.12. Provide analysis and evaluation of existing and future issues associated with the adoption of electric and plug-in hybrid electric vehicles in California including the influence of federal and state policy and technology development.
- 4.13. Identify California electrification strategies and activities, evaluate the schedules and uncertainty of these activities, quantify associated electricity demand implications and develop demand forecast methodologies including, but not limited to: transportation port electrification, residential and commercial electrification, and truck stop electrification.

TASK 5 NATURAL GAS ASSESSMENT AND FORECASTING

The goal of this task is to obtain expert technical assistance on a variety of natural gas issues. Assistance will be provided in the areas of infrastructure analysis, supply and production cost analysis, gas demand analysis, price forecasting, risk analysis, and data collection.

At the direction of the CAM through a properly executed Work Authorization, the Contractor shall:

- 5.1. Evaluate the potential operational and planning role of natural gas storage facilities in California and the United States in providing fuel system reliability to the electric generation sector and mitigating price spikes to customers.
- 5.2. Assess the potential need for new or expanded pipeline capacity in California and the United States to meet economic or reliability needs.
- 5.3. Evaluate potential impact to natural gas supplies and prices in California from a switch from coal-fired generation in other states to natural gas and renewables.
- 5.4. Evaluate California's natural gas infrastructure to identify potential operational, safety, and reliability risks related to providing natural gas to power plants in the state in a 33% or greater renewable generation environment.
- 5.5. Assess the trends, risks, and consequences of potential regulatory action related to shale gas supply and other unconventional sources of natural gas over the next 20 years.
- 5.6. Assess the effects to California's natural gas markets resulting from the construction and operation of LNG import or export terminals over the next 20 years.

- 5.7. Assist staff in refining the methods and methodologies used to forecast natural gas parameters.
- 5.8. Help staff in collecting data and information necessary to assess or model natural gas markets.
- 5.9. Assist staff in designing and applying probabilistic methods to evaluate results from natural gas forecasting models.
- 5.10. Assess the operational and planning implications of difference in market structures and operations between natural gas and electricity.
- 5.11. Utilize hydraulic modeling methods to assess short run flow effects of large swings in fossil generation demands resulting from high renewable energy penetration.
- 5.12. Assess changes in the supply and demand profiles of Canada and Mexico and their potential effects on natural gas prices, availability, and operations.
- 5.13. Investigate the effects of transportation and industrial demand for natural gas on the prices and availability of natural gas for electric generation in California and the West.

TASK 6 CENTRAL STATION AND DISTRIBUTED GENERATION MARKET ASSESSMENT AND ANALYSIS

The goal of this task is to obtain expert technical analysis and support of assessments and analyses related to the costs, locations, and other relevant factors associated with investments in central station and distributed generation. Assistance will be focused on the areas of understanding the underlying factors associated with investment decisions as well as the potential future decisions under various policy regimes.

At the direction of the CAM through a properly executed Work Authorization, the Contractor shall:

- 6.1. Provide assistance in developing estimates of technical and market potential for Combined Heat Power (CHP) for different technologies, in different sectors of the economy and in different locations. Identify economic incentives for the development of CHP and their potential and likely impact.
- 6.2. Evaluate dispatchability options for CHP. Assess impacts on performance and overall efficiency of existing and new CHP by technology, economic sector and location. Assist in the development of daily output curves, on-site use, GHG implications and exports by sector.
- 6.3. Provide technical assistance in developing analyses of the impact of large-scale deployment of on-site and export CHP. Assess the implications of the large-scale deployment of CHP from various economic sectors and their implications for the development of other generation resources needed to meet electricity demand, reliability and emissions reductions in California

- 6.4. Provide technical support for the evaluation of the operation of renewable resources based on technology and location. Assist in developing operating profiles, capacity factor estimates, variability and peak hour availability estimates based on historical output and/or generation source (solar irradiation, wind density, and others) data.
- 6.5. Provide technical support for the modeling and evaluation of the performance, operating characteristics, costs, and emissions of flexible CHP systems.
- 6.6. Provide technical support for analysis of the costs, operating characteristics, regulation, incentives and other factors that influence deployment and impact of flexible CHP.
- 6.7. Provide technical support for analysis of the costs, economics, operation characteristics, regulation/incentives, and other factors that influence deployment of thermal metering technologies.
- 6.8. Provide technical support for the economic assessment of emerging and mature solar thermal and photovoltaic technologies. Assist in the development of cost estimates for project construction, associated transmission costs, and levelized energy cost estimates based on technology and location.
- 6.9. Provide technical support to evaluate new market structures or regulatory mechanisms to encourage investments in the generation and storage technologies needed to integrate intermittent renewable technologies and other system reliability requirements.
- 6.10. Provide technical support to assess the revenue requirements to implement and integrate a combination of electricity supply and demand programs associated with target policy goals.
- 6.11. Provide technical support to update the cost drivers and associated uncertainties affecting the calculated levelized costs of fossil generation technologies. Provide technical assistance to evaluate the probabilities that a combination of uncertainties will result in higher or lower levelized costs to inform decision makers about the possibility that certain policies may impact overall electricity system costs.

TASK 7 DISTRIBUTION SYSTEM AND DISTRIBUTED GENERATION ASSESSMENT AND ANALYSIS

The goal of this task is to obtain expert technical assistance on a variety of issues related to distribution system planning and costs, interconnection and integration of distributed generation, as well as integrated regional transmission and distribution power flow analysis.

At the direction of the CAM through a properly executed Work Authorization, the Contractor shall:

- 7.1. Provide expert technical assistance on a variety of issues related to distribution system planning and costs, interconnection and integration of distributed generation, as well as integrated regional transmission and distribution power flow analysis.
- 7.2. Provide technical support for the development and evaluation of distribution system planning processes and methodologies.

- 7.3. Provide distribution circuit and power flow modeling expertise and technical support to assist with assessments of a range of infrastructure investments necessary to ensure the safe interconnection of distributed generation resources to the utility's distribution system.
- 7.4. Provide expertise and support for regional modeling of the impacts of renewable generation on the integrated transmission and distribution system.
- 7.5. Provide technical support for evaluating the upgrades to the distribution system and changes in distribution engineering practices of interconnection requirements needed to incorporate high levels of distributed generation into the electricity system.

TASK 8 DEVELOPMENT OF PREFERRED DISTRIBUTED RENEWABLE ENERGY DEVELOPMENT ZONES

The goal of this task is to obtain expert technical assistance to evaluate development zones where renewable distributed resources can be developed cost effectively. This task will focus primarily on identifying the desirable characteristics, location and project size for renewable project development in rural and urban areas in the state. The goal will be to minimize environmental impacts while controlling or minimizing costs to the state.

At the direction of the CAM through a properly executed Work Authorization, the Contractor shall:

- 8.1. Provide technical expertise in Geographical Information System program and various mapping tools to assist staff provide comprehensive representations of distributed renewable resource development zone attributes.
- 8.2. Assist staff with an analysis of a pilot study area to determine the optimal mix of locations, technologies, and projects sizes that minimize environmental and distribution system impacts with an emphasis on cost containment.
- 8.3. Provide technical expertise to help develop a technical and regulatory framework to be used to develop distributed renewable energy development zones throughout the state.

III. Proposal Format, Required Documents, and Delivery

ABOUT THIS SECTION

This section contains the format requirements and instructions on how to submit a proposal. The format is prescribed to assist the Bidder in meeting State bidding requirements and to enable the Commission to evaluate each proposal uniformly and fairly. Bidders must follow all Proposal format instructions, answer all questions, and supply all requested data.

REQUIRED FORMAT FOR A PROPOSAL

All proposals submitted under this RFP must be typed or printed using a standard 11-point font, single-spaced and a blank line between paragraphs. Pages must be numbered and sections titled and printed back-to-back. Spiral or comb binding is preferred. Binders are discouraged.

NUMBER OF COPIES

Bidders must submit the original and 5 copies of Volume 1 and Volume 2

Bidders must also submit electronic files of all volumes of the proposal on [CD-ROM or USB memory stick](#) along with the paper submittal. Only one CD-ROM or USB memory stick is needed. Electronic files must be in Microsoft Word XP (.doc format) and Excel Office Suite formats. Completed Budget Forms, Attachment 7, must be in Excel format. Electronic files submitted via e-mail will not be accepted.

PACKAGING AND LABELING

The original and copies of each volume must be labeled "Request for Proposal RFP-13-801," and include the title of the proposal and the appropriate volume number:

Include the following label information and deliver your proposal, in a sealed package:

Person's Name, Phone # Bidder's Name Street Address City, State, Zip Code FAX #	RFP-13-801 Contracts Office, MS-18 California Energy Commission 1516 Ninth Street, 1st Floor Sacramento, California 95814
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PREFERRED METHOD FOR DELIVERY

A Bidder may deliver a proposal by:

- U. S. Mail
- Personally
- Courier service

Proposals must be delivered no later than 3:00 p.m., to the Commission Contracts Office during normal business hours and prior to the date and time specified in this RFP. In accordance with Public Contract Code 10344, proposals received after the specified date and time are considered late and will not be accepted. There are no exceptions to this law. Postmark dates of mailing, E-mail and facsimile (FAX) transmissions are not acceptable in whole or in part, under any circumstances.

ORGANIZE YOUR PROPOSAL AS FOLLOWS

SECTION 1, Administrative Response

Cover Letter

Table of Contents

Contractor Status Form	Attachment 1
Darfur Contracting Act Form	Attachment 2
Small Business Certification	If applicable
Completed Disabled Veteran Business Enterprise form	Attachment 3.3
Bidder Declaration form GSPD-05-105	Attachment 3.4
Contractor Certification Clauses	Attachment 4

SECTION 2, Technical and Cost Proposal

- A. Bidder's Organizational Structure
 - B. Bidder's Administrative Capabilities
 - C. Bidder and Sub-Contractor Qualifications
 - D. Team Member Experience and Capabilities by Task
 - E. Previous Work Products
 - F. Client References
 - G. Budget Forms
- | | |
|--|--------------|
| | Attachment 5 |
| | Attachment 7 |

A. Bidder's Organizational Structure

Provide an organizational chart that shows the Bidder and the members of the contractor/subcontractor team and the relationships between and within each of the firms/companies (including subcontractor and DVBE companies). Identify the primary persons responsible for the interface between the Bidder and the Energy Commission, and between each proposed subcontractor and the Bidder. Explain the relationship of each technical staff to the organization of the rest of your company. Provide information including:

1. Describe reliability, continuity, professional awards, location of the Bidder, and subcontractors, including DVBE's.
2. Provide a short description of each firm and key members on the team. Describe the relationship between the Contractor and subcontractors on your team.
3. Identify the location of the Bidder's and Subcontractor's headquarters and satellite office(s) and proposed methods of minimizing costs to the State. Describe Bidder's professional awards.
4. Describe the organization, composition, and functions to be performed by staff members of the Bidder and any subcontractors and how the staff pertains to this contract.

B. Bidder's Administrative Capabilities

Describe the overall strength and ability of the Bidder to effectively and efficiently manage this contract. This discussion should highlight past experience as well as effective practices planned to implement the diverse nature of this contract. Examples of recent work are especially helpful.

Describe how you will ascertain the fiscal status of each Work Authorization and the overall contract, prevent accumulation of cost overruns, determine if each Work Authorization is on schedule, determine that all deliverables have been submitted and accepted and track the start, progress and closure for each Work Authorization. Describe your management information reports.

Identify the individual who will oversee the proposed project as your Project Manager. Provide details how that Project Manager has the requisite capabilities to manage the work proposed, providing, if possible, examples of a similar project managed by that individual.

Describe how you resolve timeliness and quality control problems. Explain how you would resolve problems where a team (composed of either employees or subcontractors):

1. is excessively late performing work and has not contacted you or the Energy Commission.
2. disagrees with findings on substantive technical errors noted by the Energy Commission staff and subcontractor refuses to modify the work without additional compensation;
3. resubmits work that is not responsive to Energy Commission comments; and
4. submits an invoice showing a substantial cost overrun on an authorized Work Authorization. (Refer to the Work Authorization clauses in the Sample Contract to see available remedies.)

Describe the Bidder's ability to provide word processing, document management, spreadsheet expertise and technical writing and editing.

C. Bidder and Subcontractor Qualifications

Document the project team's qualifications as they apply to performing the tasks described in the Scope of Work and above. Describe recently completed work as it relates to this Scope of Work.

1. Identify and list all Bidder staff and subcontractors (all team members) who will be committed to the tasks and describe their roles.
2. Provide a current resume for all team members listed, including job classification and description, relevant experience, education, academic degrees and professional licenses.
3. Identify the percentage of time each team member will be available throughout the contract.

D. Team Member Experience and Capabilities by Task

The Energy Commission seeks a highly qualified team with the following specific expertise as outlined in the Scope of Work:

- Experience with modeling
- Access to market performance data
- Familiarity with energy infrastructure systems
- Experience with Energy Commission programs, policy initiatives, and staff
- Experience with applicable computer software, including spreadsheets, word processing, graphics and presentations etc.
- Computer programming experience
- Project management expertise
- Knowledge of market performance indices: data collection and trends analysis
- Experience with simulation model calibration: data collection and trends analysis
- Knowledge of electricity demand forecasting
- Meeting facilitation experience
- Experience with CHP technologies
- Experience with and knowledge of both fossil and renewable generation technologies.
- Experience with Electricity system infrastructure including: generation, transmission, and distribution.
- Experience with analyzing and assessing natural gas infrastructure, markets and prices.

Describe the team (subcontractor) qualifications and current or past relationships highlighting any special expertise that will be utilized in achieving the project objectives outlined in the Scope of Work. Describe the strengths of your team including accomplishments and past efforts relevant to this project. Indicate how all team members are qualified and necessary to perform the proposed work, showing previous relevant work as outlined below.

Describe all technical and professional staff members that will be assigned to this project. Clearly define which team members will work on each task area outlined in the Scope of Work. Provide the title or classification of each significant team member as it applies to this project, and specify his/her roles and functions that will be utilized. Provide resumes for each team member who will be working on this project including current job classification, education, professional experience, and areas of responsibility within each team member's organization. List the availability of each individual by person hours and percentage of time that person will be assigned to each task, and provide resumes for all technical and professional staff.

E. Previous Work Products

Give examples of each team member's experience in performing the same or similar work in each of the task areas listed including product that demonstrates successfully completed relevant work by your organization or team. Explain the relevance and dates of this prior work to the Scope of Work and the proposed contract. Each bidder shall provide at least one example of a similar work product for the services to be provided. If subcontractors will be providing technical support in a task area, each subcontractor shall also submit one example work product that demonstrates experience in potential work assignments described in this RFP.

It is not necessary to provide more than one copy of each work product example. Web links are acceptable.

F. Client References

Each bidder shall provide three client references for the Contractor and three for each subcontractor. Bidders should, if possible, provide a list of clients or employers who have received similar services from the Bidder or the Bidder's personnel or subcontractors, during the last three (3) years by completing Attachment 5, "Client References". Such services should be of comparable complexity to the services requested in this RFP. Complete one customer reference form for each company.

All references must include the name and telephone number of a contact person with the contacting organization. These individuals, as well as others, may be contacted by the Energy Commission when reviewing the submitted proposals. Final evaluations filed with the State on Bidder's past contract performance may be reviewed; therefore, the Bidder may wish to discuss any disagreements he/she has with those evaluations.

G. Budget Forms

Prime Labor Rates	Attachment 7, Attachment B-1
Labor Rates for each Subcontractor	Attachment 7, Attachment B-1a-z
Prime Non-Labor Rates	Attachment 7, Attachment B-2
Non-Labor Rates for each Subcontractor	Attachment 7, Attachment B-2a-z
Direct Operating Expenses	Attachment 7, Attachment B-3
Loaded Hourly Rate Calculation	Attachment 7, Attachment B-4

The Bidder must submit information on **all** of the attached budget forms, B-1 through B-4, and this will be deemed the equivalent of a formal Cost Proposal.

Detailed instructions for completing these forms are included at the beginning of Attachment 7.

Rates and personnel shown must reflect rates and personnel you would charge if you were chosen as the Contractor for this RFP. The salaries, rates, and other costs entered on these forms become a part of the final agreement. The entire term of the agreement and projected rate increases must be considered when preparing the budget. The rates bid are considered capped and shall not change during the term of the contract. The Contractor shall only be reimbursed for their **actual** rates up to these rate caps. The hourly rates provided in all B-1s shall be unloaded (before fringe benefits, overheads, general & administrative (G&A) or profit).

All budget forms are required because they will be used for the contract prepared with the winning Bidder.

NOTE: The information provided in these forms will **not** be kept confidential.

Attachment B-4: Loaded Hourly Rate Calculation

This attachment will be used for the purposes of calculating the average hourly rate score under **cost criterion 5.1**, located in the Evaluation Criteria Worksheet. The loaded hourly rate is defined as direct labor, fringe benefits, non-labor rates (overhead, general and administrative, etc., as applicable), and profit (if applicable).

1. Use one form for the Bidder (Prime Contractor) and one for each subcontractor. Insert your company or organization name at the top of the form.

2. For each staff person from this company or organization that will be directly billed to this Agreement:
 - Provide the job classifications or title.
 - Insert the unloaded hourly rates in the direct labor column. You must use the rates provided on Forms **B-1 and B-2** for your company or organization when calculating the loaded hourly rates. Follow the instructions on the form, Attachment **B-4**, Loaded Hourly Rate Calculation, in budget workbook.

IV. Evaluation Process and Criteria

ABOUT THIS SECTION

This section explains how the proposals will be evaluated. It describes the evaluation stages, preference points, and scoring of all proposals.

PROPOSAL EVALUATION

A Bidder's proposal will be evaluated and scored based on their response to the information requested in this RFP. The entire evaluation process from receipt of proposals to posting of the Notice of Proposed Award is confidential.

To evaluate all Proposals, the Energy Commission will organize an Evaluation Committee. The Evaluation Committee may consist of Energy Commission staff or staff of other California state entities.

The Proposals will be evaluated in two stages:

Stage One: Administrative and Completeness Screening

The Contracts Office will review Proposals for compliance with administrative requirements and completeness. Proposals that fail Stage One shall be disqualified and eliminated from further evaluation.

Stage Two: Technical and Cost Evaluation of Proposals

Proposals passing Stage One will be submitted to the Evaluation Committee to review and score based on the Evaluation Criteria in this solicitation.

During the evaluation and selection process, the Evaluation Committee may schedule a clarification interview with a Bidder that will either be held by telephone or in person at the Energy Commission for the purpose of clarification and verification of information provided in the proposal. However, these interviews may not be used to change or add to the contents of the original Proposal.

The total score for each Proposal will be the average of the combined scores of all Evaluation Committee members.

After scoring is completed, Proposals not attaining a score of 70 percent of the total possible points will be eliminated from further competition.

All applicable Preferences will be applied to all Proposals attaining a minimum of 70 percent of the total possible points. The agreement shall be awarded to the responsible Bidder meeting the requirements outlined above, who achieves the highest score after application of Preferences.

SCORING SCALE

Using this Scoring Scale, the Evaluation Committee will give a score for each criterion described in the Evaluation Criteria Worksheet.

% of Possible Points	Interpretation	Explanation for Percentage Points
0%	Not Responsive	Response does not include or fails to address the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
10-30%	Minimally Responsive	Response minimally addresses the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
40-60%	Inadequate	Response addresses the requirements being scored, but there are one or more omissions, flaws, or defects or the requirements are addressed in such a limited way that it results in a low degree of confidence in the proposed solution.
70%	Adequate	Response adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable.
80%	Good	Response fully addresses the requirements being scored with a good degree of confidence in the Bidder's response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable.
90%	Excellent	Response fully addresses the requirements being scored with a high degree of confidence in the Bidder's response or proposed solution. Bidder offers one or more enhancing features, methods or approaches exceeding basic expectations.
100%	Exceptional	All requirements are addressed with the highest degree of confidence in the Bidder's response or proposed solution. The response exceeds the requirements in providing multiple enhancing features, a creative approach, or an exceptional solution.

PREFERENCE POINTS

A Bidder may qualify for non-technical preference points described below. Each qualifying Bidder passing the minimum technical evaluation will receive the applicable preference points.

Disabled Veteran Business Enterprise Incentive

The DVBE Incentive program was established pursuant to Military & Veterans Code Section 999.5(2) and Department of General Services' Regulations 2 CCR 1896.98 et.seq. The information in Attachment 3.1 explains how the incentive is applied and how much of an incentive will be given.

Small / Microbusiness

Bidders who qualify as a State of California certified small/microbusiness will receive a cost preference of five percent (5%) of the lowest cost or price offered by the lowest responsible Bidder who is not a certified small/microbusiness, by deducting this five percent from the small/microbusiness Bidder's cost, for the purpose of comparing costs for all Bidders. Bidders qualifying for this preference must submit a copy of their Small Business Certification and document their status on Attachment 1, Contractor Status Form.

Non-Small Business

The preference to a non-small business bidder that commits to small business or microbusiness subcontractor participation of twenty-five percent (25%) of its net bid price shall be five percent (5%) of the lowest, responsive, responsible Bidder's price. A non-small business which qualifies for this preference may not take an award away from a certified small business. Bidders qualifying for this preference must document the small business status of all subcontractors on Attachment 3.4 and submit all applicable Small Business Certifications.

Target Area Contract Preference Act/ Enterprise Zone Act/ Local Agency Military Base Recovery Act

The following preferences will be granted for this solicitation. Bidders wishing to take advantage of these preferences will need to review the websites stated below and submit the appropriate response with their Bid.

Target Area Contract Preference Act (TACPA)

The Target Area Contract Preference Act (Government Code Section 4530 et seq.) provides five percent (5%) preference points to California-based companies that perform state contract work in a distressed area. Bidders should review the information located at <http://www.documents.dgs.ca.gov/pd/poliproc/tacpage.pdf> to determine if they qualify for this preference.

Enterprise Zone Act (EZA)

The Enterprise Zone Act (Government Code Section 7070, et seq.) provides preference points as an incentive for business and job development in distressed and declining areas of the State. Bidders should review the information located at <http://www.documents.dgs.ca.gov/pd/poliproc/ezapage.pdf> to determine if they qualify for this incentive.

Local Agency Military Base Recovery Act (LAMBRA)

The Local Agency Military Base Recovery Act (Government Code Section 7118, et seq.) provides five percent (5%) preference points to California-based companies that perform State contract work in the LAMBRA. Bidders should review the information located at <http://www.documents.dgs.ca.gov/pd/poliproc/lambrapage.pdf> to determine if they qualify for this preference.

The TACPA, EZA, and LAMBRA preferences only apply to California based firms that demonstrate and certify under penalty of perjury that at least 50% of the total labor hours for manufactured goods or 90% of the total labor hours for services will be performed in distressed areas. The maximum preference that can be given for any bid may not exceed 9% up to \$50,000.00.

Bidders wishing to take advantage of these preferences are required to submit the following applications/forms available on the above websites with their Bid:

- TACPA (Std. 830) and/or EZA (Std. 831) and or LAMBRA (Std. 832)
- Bidder's Summary of Contract Activities and Labor Hours (DGS/PD 526)

If you have further questions or need additional information on this matter, please contact TACPA/EZA/LAMBRA Preference Program Group at (916) 375-4609.

NOTICE OF PROPOSED AWARD

The Commission will post a Notice of Proposed Award (NOPA) at the Commission's headquarters in Sacramento, on the Commission's Web Site, and will mail the NOPA to all parties that submitted a proposal.

EVALUATION CRITERIA

The following will take into consideration the relevance of the response to Organizational Structure, Relevant Experience and Qualifications, and bidders approach to Approach to tasks in Scope of Work.

REFERENCES WILL BE CONSIDERED THROUGHOUT THE SCORING PROCESS

If the bidder fails to complete the below forms correctly their bid will be rejected

ADMINISTRATIVE CRITERIA	PASS	FAIL
Contractor Status Form		
Darfur Contracting Act Form		
Small Business Certification		
Completed Disabled Veteran Business Enterprise form		
Bidder Declaration form GSPD-05-105		
Contractor Certification Clauses		

CRITERIA	Weight Factor	Points (1-10)	Total Points Possible
Bidders Organizational Structure	5		
Organizational chart shows efficient, well-defined team structure			
Demonstrated breadth and depth of experience with contractor/subcontractor management			
Responsiveness to Work Statement requirements			
Clearly defined functions to be performed by staff members of the Bidder and any subcontractors and how the staffing pertains to this contract.			
Number and prestige of Bidder's (and Sub-contractor's) professional awards.			
Bidder 's Administrative Capabilities	5		
Demonstrates strong capability to effectively and efficiently manage personnel and sub-contractors.			
Demonstrates adequate fiscal management and controls.			
Demonstrated experience and success at managing multiple, complex issues and resolving problems and disputes.			
Has capability for word processing, document management, spreadsheet expertise, and technical writing and editing.			
Has well established quality control processes.			
Bidder and Sub-Contractor Qualifications	5		

Has demonstrated expertise and experience in conducting overall technical support as described in the technical tasks.			
Resume provided for all personnel (Bidder and sub-contractors)			
Availability of key personnel in all pertinent areas.			
Team Member Experience and Capabilities by Task	5		
Demonstrated breadth and depth of coverage for all technical areas and functions to be performed by Bidder and Sub-contractors.			
Proper alignment of key personnel (Bidder and sub-contractors) with technical tasks and deployment in appropriate teams.			
Clear descriptions of background and expertise of personnel of Bidder and Subcontractors.			
Bidder identified appropriate techniques, approaches, and methods to be used in providing the services listed in the Scope of Work, highlighting any outstanding features, qualifications and experience.			
Previous Work Products	5		
Bidder provided at least one example of a similar work product for the services (Bidder or sub-contractor) as described in the RFP.			
Experience described is both relevant and recent.			
Quality of example(s) of similar project(s) managed by the prime contractor			
Client References	5		
References provided for all Bidder and sub-contractor personnel.			
Team Qualifications: Electricity System and Infrastructure Analysis	10		
Demonstrated breadth and depth of knowledge of and experience with transmission and distribution systems and how they are affected by capacity expansions, long term resource and capacity expansion planning (10-20 years)			
Demonstrated breadth and depth of knowledge of analyzing impacts of power plants location, including interconnection in the power grid			
Demonstrated breadth and knowledge of integrating variable energy resources, how hydro and fossil generation and dispatch may be changed to accommodate intermittent renewable generation, energy storage, imported energy, environmental policy, and system stability.			
Demonstrated breadth and knowledge of trade off utilities could face between power imports and internal capacity which is needed for system reliability			
Demonstrated breadth and knowledge of electricity distribution systems			

Demonstrated breadth and depth of knowledge and experience concerning the use of energy efficiency, renewable generation, distributed generation, demand side programs such as demand response and time of use rates, load growth programs, and fossil generation resource development required by Western regulators in the electricity sector			
Demonstrated breadth and depth of knowledge of and experience with various modeling techniques related to electricity system integration, creating in-house tools, like MS Excel and Access, to compile, analyze, and present data. The data shall include hourly and sub-hourly data on generation, electrical loads, transmission flows, and capacity factors for intermittent resources such as wind and solar.			
Demonstrated depth and quality of work examples			
Demonstrated breadth and depth of knowledge with distributed generation, this shall include: costs, economics, operating characteristics, regulation/incentives, requirements or potential problems of to incorporate large amounts of distributed generation into the electricity system.			
Demonstrated breadth and depth of knowledge of analyzing uncertainties surrounding all types of variables in the power sector			
Team Qualifications: Improve Demand Forecasting Methods	5		
Demonstrated breadth and depth of knowledge of and experience with demand forecasting methodologies			
Demonstrated breadth and depth of experience in assessing the effects on electricity demand of building and appliance standards, energy efficiency, and other demand-side programs			
Demonstrated breadth and depth of knowledge of and experience with probabilistic forecasting methods			
Demonstrated depth and quality of work examples			
Team Qualifications: Improve Energy Demand Analysis	5		
Demonstrated breadth and depth of knowledge of existing and/or potential Resource Adequacy load forecasting methodologies and other areas of technical expertise required to effectively complete Task 4			
Proficiency with spreadsheet models and Access database integration			
Demonstrated breadth and depth of experience in working with hourly load data			
Demonstrated breadth and depth of analytical skills, including analysis of coincidence			
Demonstrated depth and quality of work examples			

Team Qualifications: Natural Gas Assessment and Forecasting	5		
Demonstrated breadth and depth of knowledge of and experience with Natural Gas Infrastructure including pipelines and storage facilities			
Demonstrated breadth and depth of knowledge and experience in analyzing CO2 (Carbon Dioxide) regulatory effects on natural gas demand and supply			
Demonstrated breadth and depth of experience with natural gas forecast modeling platforms			
Demonstrated breadth and depth of knowledge of natural gas markets, infrastructure, systems, and cost-production factors, and natural gas market trading (e.g., spot and forward curves, futures and swaps, hedging, bilateral contracts, etc.)			
Experience in developing and implementing technical and analytical natural gas training programs			
Demonstrated breadth and depth of experience with Shale gas supply and other forms of unconventional Natural Gas (LNG, Natural Gas Hydrates, etc.)			
Demonstrated depth and quality of work examples			
Team Qualifications: Central Station and Distributed Generation Market Assessment and Analysis	5		
Demonstrated breadth and depth of knowledge of and experience assessing and analyzing Combined Heat and Power (CHP) as described in Task 6			
Demonstrated breadth and depth of knowledge of and experience with methods and techniques used to evaluate Various CHP and distributed generation technologies			
Experience in developing, and analyzing the uncertainties of the levelized cost of both fossil and renewable generation technologies			
Demonstrated breadth and depth of knowledge of and experience with electric utility dispatch methods and modeling techniques			
Demonstrated depth and quality of work examples			
Team Qualifications: Distribution System and Distributed Generation Assessment and Analysis	5		
Demonstrated breadth and depth of knowledge of and experience assessing and analyzing electric power distribution			
Demonstrated breadth and depth of knowledge of and experience with methods and techniques used to evaluate electric power distribution			
Demonstrated breadth and depth of knowledge of and experience assessing and analyzing distributed electric power generation systems			

Demonstrated breadth and depth of knowledge of and experience with methods and techniques used to evaluate distributed electric power generation systems			
Demonstrated breadth and depth of knowledge of and experience assessing and analyzing electric power flow			
Demonstrated breadth and depth of knowledge of and experience with methods and techniques used to evaluate electric power flow			
Demonstrated breadth and depth of knowledge of and experience assessing and analyzing renewable generation			
Demonstrated breadth and depth of knowledge of and experience with methods and techniques used to evaluate renewable generation			
Experience in developing, and analyzing the levelized cost of integrated electric power distribution technologies			
Demonstrated depth and quality of work examples			
Team Qualifications: Development of Preferred Distributed Renewable Energy Development Zones	5		
Demonstrated breadth and depth of knowledge of and experience with Geographical Information System program and various mapping tools			
Demonstrated breadth and depth of knowledge of and experience with analyzing the environmental impact of electric power distribution systems			
Demonstrated breadth and depth of knowledge of and experience with analyzing the levelized cost of electric power distribution systems			
Demonstrated breadth and depth of knowledge of and experience with the development of regulatory framework			
Demonstrated depth and quality of work examples			
BUDGET AND COST EFFECTIVENESS			
1. Average Loaded Hourly Rate (Cost Points). The Score for this criteria will be derived from the mathematical cost formula set forth below, which compares the cumulative average loaded hourly rate of all loaded hourly rates listed in the subject Bidder's Cost Bid, with the cumulative average loaded hourly rate of all loaded hourly rates listed in the Lowest Bidder's cost bid.	25		
2. Cost Justification. Bidder has justified all proposed personnel identified in its bid for all technical areas and functions to be performed by Prime and Team Members.	5		

SCORING			
Total Possible Cost Points (approximately 30% of Maximum Points Possible)			30
Minimum Passing Score (70%)			70
Maximum Points Possible (combined Technical and Cost Points)			100
Disabled Veteran Business Enterprise Preference (5%)			
Small Business Preference (5%)			
Target Area Contract Performance Act Adjustment (5%)			
Enterprise Zone Act Adjustment (5%)			
Local Agency Military Base Recovery Area Adjustment (5%)			
TOTAL SCORE:			

The method for evaluating the based on average loaded hourly rate is the formula below:

i. Cost Formula for calculation of average loaded hourly rate score (criterion 1 above)

“**Lowest Bidder**” is defined as the Bidder with the lowest cumulative average loaded hourly rate for all prime contractor and all subcontractor personnel.

For example (using the following arbitrary hourly rates and fictional cost bids):

Bidder 1

Prime Contractor	Subcontractor A	Subcontractor B
Project Manager: \$100/hr	Engineer I: \$90/hr	Engineer IV: \$120/hr
Engineer II: \$100/hr		
Engineer III: \$110/hr		

Bidder 1's cumulative average loaded hourly rate = 100 + 90 + 100 + 110 + 120 divided by 5 = **\$104**

Bidder 2

Prime Contractor	Subcontractor A	Subcontractor B
Project Manager: \$100/hr	Engineer I: \$100/hr	Engineer IV: \$130/hr
Engineer II: \$110/hr		
Engineer III: \$120/hr		

Bidder 2's cumulative average loaded hourly rate = 100 + 100 + 110 + 120 + 130 divided by 5 = **\$112**

Bidder 3

Prime Contractor	Subcontractor A	Subcontractor B
Project Manager: \$110/hr	Engineer I: \$110/hr	Engineer IV: \$140/hr
Engineer II: \$120/hr		
Engineer III: \$130/hr		

Bidder 3's cumulative average loaded hourly rate = 110 + 110 + 120 + 130 + 140 divided by 5 = **\$122**

In the examples above, Bidder 1 would be the Lowest Bidder.

ii. The Cost Formula for calculating the Points Awarded for criterion 1 above is as follows:

a. Calculate Cumulative Average Loaded Hourly Rate

For each Bidder, we calculate the average rate, by adding all rates, and dividing by the number of rates:

Sum of all rates divided by Number of Rates Given = Average Loaded Hourly Rate for each Bidder: \$_____

b. Create Percentage

Then we compare rates of all the Bidders, by creating a percentage of the Bidder's rate, compared to the lowest Bidder's rate. The lowest Bidder will have the highest percentage of points:

(Lowest Bidder's Cumulative Average Loaded Hourly Rate divided by Bidder's Cumulative Average Loaded Hourly Rate) = Bidder's Percentage of Points

c. Apply Possible Points

Finally, we multiply the Bidder's Percentage of Points by the number of possible points:

Bidder's Percentage of Points X Possible Points = Points Awarded

Following is an example of Cost Score Calculation, using the above examples:

Cumulative Average Hourly Rates: Bidder #1 = \$104, Bidder #2 = \$112, Bidder #3=\$122

<i>Bidder #1</i>			<i>Bidder #2</i>			<i>Bidder #3</i>		
104 divided by 104 = 100%			104 divided by 112 = 93%			104 divided by 122 = 85%		
Possible Points	Percentage of Points	Points Awarded	Possible Points	Percentage of Points	Points Awarded	Possible Points	Percentage of Points	Points Awarded
20	100%	20	20	93%	18.6	20	85%	17

iii. Cost Justification

In relation to Cost Criteria 2 above, the bidder shall explain and justify all proposed personnel identified in the Proposal for all technical areas and functions to be performed by the Prime and each of the Subcontractors.

V. Administration

RFP DEFINED

The competitive method used for this procurement of services is a Request for Proposal (RFP). A Proposal submitted in response to this RFP will be scored and ranked based on the Evaluation Criteria. Every Proposal must establish in writing the Bidder's ability to perform the RFP tasks.

DEFINITION OF KEY WORDS

Important definitions for this RFP are presented below:

Word/Term	Definition
State	State of California
DGS	Department of General Services
Energy Commission	California Energy Commission
RFP	Request for Proposal, this entire document
Proposal	Formal written response to this document from Bidder
Bidder	Respondent to this RFP
CAM	Commission Agreement Manager
DVBE	Disabled Veteran Business Enterprises

COST OF DEVELOPING PROPOSAL

The Bidder is responsible for the cost of developing a proposal, and this cost cannot be charged to the State.

SOFTWARE APPLICATION DEVELOPMENT

If this scope of work includes any software application development, including but not limited to databases, websites, models, or modeling tools, contractor shall utilize the following standard Application Architecture components in compatible versions:

- Microsoft ASP.NET framework (version 3.5 and up) Recommend 4.0
- Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5
- Visual Studio.NET (version 2008 and up) Recommend 2010
- C# Programming Language with Presentation (UI), Business Object and Data Layers
- SQL (Structured Query Language)
- Microsoft SQL Server 2008, Stored Procedures Recommend 2008 R2
- Microsoft SQL Reporting Services Recommend 2008 R2
- XML (external interfaces)

Any exceptions to the Electronic File Format requirements above must be approved in writing by the Energy Commission Information Technology Services Branch.

PRINTING SERVICES

Per Management Memo 07-06, State Agencies must procure printing services through the Office of State Publishing (OSP). Bidders shall not include printing services in their proposals.

CONFIDENTIAL INFORMATION

The Commission will not accept or retain any Proposals that have any portion marked confidential.

DARFUR CONTRACTING ACT OF 2008

Effective January 1, 2009, all solicitations must address the requirements of the Darfur Contracting Act of 2008 (Act). (Public Contract Code sections 10475, *et seq.*; Stats. 2008, Ch. 272). The Act was passed by the California Legislature and signed into law by the Governor to preclude State agencies generally from contracting with “scrutinized” companies that do business in the African nation of Sudan (of which the Darfur region is a part), for the reasons described in Public Contract Code section 10475.

A scrutinized company is a company doing business in Sudan as defined in Public Contract Code section 10476. Scrutinized companies are ineligible to, and cannot, bid on or submit a proposal for a contract with a State agency for goods or services. (Public Contract Code section 10477(a)).

Therefore, Public Contract Code section 10478 (a) requires a company that currently has (or within the previous three years has had) business activities or other operations outside of the United States to certify that it is not a “scrutinized” company when it submits a bid or proposal to a State agency. (See # 1 on Attachment 2)

A scrutinized company may still, however, submit a bid or proposal for a contract with a State agency for goods or services if the company first obtains permission from the Department of General Services (DGS) according to the criteria set forth in Public Contract Code section 10477(b). (See # 2 on Attachment 2)

DISABLED VETERAN BUSINESS ENTERPRISES (DVBE) COMPLIANCE REQUIREMENTS

The Disabled Veteran Business Enterprise (DVBE) Program has two inter-related aspects:

Participation Goals: The mandatory DVBE Participation Program of achieving participation goals by attaining the minimum 3% goal.

And,

Incentive: The DVBE Incentive Program gives a contractor an opportunity to improve their bid status based on the efforts attained from the DVBE Participation Program.

This RFP is subject to a participation goal of three percent (3%) certified California Disabled Veteran Business Enterprise (DVBE) as set forth in Public Contract Code Section 10115 *et seq.*

RFP CANCELLATION AND AMENDMENTS

If it is in the State’s best interest, the Energy Commission reserves the right to do any of the following:

- Cancel this RFP;
- Amend this RFP as needed; or

- Reject any or all Proposals received in response to this RFP.

If the RFP is amended, the Energy Commission will send an addendum to all parties who requested the RFP and will also post it on the Energy Commission's Web Site www.energy.ca.gov/contracts and Department of General Services' Web Site http://www.bidsync.com/DPX?ac=powersearch&srchoid_override=307818.

ERRORS

If a Bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the Bidder shall immediately notify the Commission of such error in writing and request modification or clarification of the document. Modifications or clarifications will be given by written notice of all parties who requested the RFP, without divulging the source of the request for clarification. The Commission shall not be responsible for failure to correct errors.

MODIFYING OR WITHDRAWAL OF PROPOSAL

A Bidder may, by letter to the Contact Person at the Energy Commission, withdraw or modify a submitted Proposal before the deadline to submit proposals. Proposals cannot be changed after that date and time. A Proposal cannot be "timed" to expire on a specific date. For example, a statement such as the following is non-responsive to the RFP: "This proposal and the cost estimate are valid for 60 days."

IMMATERIAL DEFECT

The Energy Commission may waive any immaterial defect or deviation contained in a Bidder's proposal. The Energy Commission's waiver shall in no way modify the proposal or excuse the successful Bidder from full compliance.

DISPOSITION OF BIDDER'S DOCUMENTS

On the Notice of Proposed Award posting date all proposals and related material submitted in response to this RFP become a part of the property of the State and public record. Bidders who want any work examples they submitted with their proposals returned to them shall make this request and provide either sufficient postage, or a Courier Charge Code to fund the cost of returning the examples.

BIDDERS' ADMONISHMENT

This RFP contains the instructions governing the requirements for a firm quotation to be submitted by interested Bidders, the format in which the technical information is to be submitted, the material to be included, the requirements which must be met to be eligible for consideration, and Bidder responsibilities. Bidders must take the responsibility to carefully read the entire RFP, ask appropriate questions in a timely manner, submit all required responses in a complete manner by the required date and time, make sure that all procedures and requirements of the RFP are followed and appropriately addressed, and carefully reread the entire RFP before submitting a proposal.

GROUND TO REJECT A PROPOSAL

A Proposal shall be rejected if:

- It is received after the exact time and date set for receipt of Proposal's pursuant to Public Contract Code, Section 10344.
- It is considered non-responsive to the California Disabled Veteran Business Enterprise participation requirements.
- It is lacking a properly executed Contractor Certification Clauses form.
- It is lacking a properly executed Darfur Contracting Act Form.
- It contains false or misleading statements or references which do not support an attribute or condition contended by the Bidder.
- The Proposal misleads the State in its evaluation of the Proposal and the attribute, condition, or capability is a requirement of this RFP.
- There is a conflict of interest as contained in Public Contract Code Sections 10410-10412 and/or 10365.5.
- It contains confidential information, or it contains any portion marked confidential.
- The Bidder does not agree to the terms and conditions as attached to the solicitation either by not signing the Contractor Status Form or by stating anywhere in the bid that acceptance is based on modifications to those terms and conditions or separate terms and conditions.
- Proposals that fail the Administrative requirements and completeness shall be disqualified and eliminated from further evaluation.

A Proposal may be rejected if:

- It is not prepared in the mandatory format described.
- It is unsigned.
- The firm or individual has submitted multiple proposals for each task.
- It does not literally comply or contains caveats that conflict with the RFP and the variation or deviation is not material, or it is otherwise non-responsive.
- The bidder has previously completed a PIER agreement, received the PIER Royalty Review letter, which the Commission annually sends out to remind past recipients of their obligations to pay royalties, and has not responded to the letter or is otherwise not in compliance with repaying royalties.
- The budget forms are not filled out completely.

PROTEST PROCEDURES

A Bidder may file a protest against the proposed awarding of a contract. Once a protest has been filed, contracts will not be awarded until either the protest is withdrawn, or the Commission cancels the RFP, or the Department of General Services decides the matter.

Please note the following:

Protests are limited to the grounds contained in the California Public Contract Code Section 10345.

During the five **working** days that the Notice of Proposed Award (NOPA) is posted, protests must be filed with the DGS Legal Office and the Commission Contracts Office.

Within five **calendar** days after filing the protest, the protesting Bidder must file with the DGS and the Commission Contracts Office a full and complete written statement specifying the grounds for the protest.

If the protest is not withdrawn or the solicitation is not canceled, DGS will decide the matter. There may be a formal hearing conducted by a DGS hearing officer or there may be briefs prepared by the Bidder and the Commission for the DGS hearing officer consideration.

AGREEMENT REQUIREMENTS

The content of this RFP shall be incorporated by reference into the final contract. See the sample Agreement terms and conditions included in this RFP.

No Contract Until Signed & Approved

No agreement between the Commission and the successful Bidder is in effect until the contract is signed by the Contractor, approved at a Commission Business Meeting, and approved by the Department of General Services, if required.

Contract Amendment

The contract executed as a result of this RFP will be able to be amended by mutual consent of the Commission and the Contractor. The contract may require amendment as a result of project review, changes and additions, changes in project scope, or availability of funding.