



# **Tribal Government Challenge**

## **STATEWIDE GAP ANALYSIS OF CALIFORNIA TRIBAL LANDS**

**Pre-Bidder Webinar**

**March 25, 2020**



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# Agenda

- Overview: Purpose, Goals, Structure and Tasks
- Bidder's Response Package
- Evaluation Criteria
- Key Activities and Dates
- Additional Information
- Bidders Comments and Questions

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# Program Overview

Purpose, Goals, Structure and Required Tasks



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# Purpose

Provide a snapshot of California Tribes pertaining to their current needs and priorities around renewable energy, climate change, and other relevant and related issues on tribal lands by:

- Identifying tribal goals and needs related to climate and energy, and
- Working with Tribes to understand their energy and climate change policies

# Goals

Support overarching climate goals for tribal communities, with a focus on underlying issues to build sustainability and resilience, and improve the State's understanding and knowledge of:

- Tribal access to energy efficiency, clean energy generation, clean transportation, alternative fuel infrastructure, and energy resiliency;
- Past or ongoing tribal efforts around climate change impacts to tribal communities; and
- Tribal environmental programs and resulting climate-related data collection, tribal research efforts, and established relationships forged with academics and government;

# Goals continued

- Share recommendations, strategies, implementation guidelines, and best practices among State agencies and Tribes.
- Identify tribes with interest in and capacity to organize regional tribal events on climate and energy topics;
- Determine underlying issues and barriers regarding Tribal access to the State's climate-related funding opportunities.

# Structure

The Statewide Gap Analysis of California Tribal Lands project is a jointly managed effort:

- Administered by the **California Strategic Growth Council (SGC)**, and
- Funded by the **California Energy Commission (CEC)** through American Recovery and Reinvestment Act (ARRA) funding.

A State Committee comprised of **these agencies** and **collaborator agencies** will guide the project's outreach and engagement efforts.

# California Energy Commission

The California Energy Commission is leading the state to a one-hundred percent clean energy future. As the state's primary energy policy and planning agency, the Commission is committed to reducing energy costs and environmental impacts of energy use while ensuring a safe, resilient, and reliable supply of energy.





# Strategic Growth Council

The mission of the Strategic Growth Council is to coordinate and work collaboratively with public agencies, communities, and stakeholders to achieve sustainability, equity, economic prosperity, and quality of life for all Californians



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# BIDDER'S RESPONSE PACKAGE

Organization and Required Submission Package Components



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# Program Scope – Tasks Overview

Include all ~171 California Native American Tribes; should include all 6 tasks identified in the RFP, with collaboration throughout with State Committee:

1. **Kick off meeting** and quarterly status meetings
2. **Develop project work plan** that clearly meets Program Goals
3. **Collaboration with State Committee** on Tribal Outreach
4. **Data collection** on topics listed in RFP
5. **Analysis and synthesis:** data patterns, themes, and trends
6. **Prepare draft and final reports**

# Submission Organization

Proposal Cover Page

Table of Contents

- A. Scope of Work and Schedule
- B. Project Team Qualifications
- C. Previous Work Products
- D. References
- E. Budget Forms and Information
- F. Quality Assurance Statement

# Scope of Work

Provide details about the plan and approach related to the program goals and topic areas. Tasks are clearly defined and logically presented. The Scope of Work must include the following information, separated into different sections:

- A description of the elements of the Statewide Gap Analysis, and how these elements work together to deliver a meaningful analysis.
- Project management and reporting structure, including partnerships, subcontractors and assigned roles and responsibilities.

# Scope of Work (Cont.)

- Quantifiable performance goals and objectives, including metrics to determine successes and failures of research, outreach, or other specific milestones.
- Realistic schedule for completion of tasks and clearly described products for each task identifying the timeline (start and end dates) for delivering required tasks as well as interim and final products and meetings.

# Team Qualifications

- Describe the project team and its organizational and reporting structure.
- Include one-page resume for each key participant that clearly describes relevant expertise and examples of prior work conducting gap analyses or tribal assessments .

# Budget

The budget template provides Microsoft Excel formatted forms and instructions.

- Expenditures must occur within the approved term stated in the contract.
- Use estimates for actual costs and properly document costs in accordance with the contract's Terms and Conditions. Rates submitted are capped and will not change.
- Subcontractors working on the project must be identified and include all associated costs.
- Include meetings expenses required to complete tasks described in the Scope of Work.
- Travel costs must align with rates specified by CalHR (found on the CalHR website).
- Equipment purchases are not an allowable expense.
- Do not include costs that will be spent outside of California



# Quality Assurance Statement (QAS)

- Discuss efforts involving data collection or processing, conducting surveys, modeling, method development, or the development of tools or technology.
- Outline internal processes that will ensure that project deliverables satisfy the intended project objectives.
- A QAS with a lab or institution's Plan for data management (e.g., a National Science Foundation Data Management Plan) can be submitted.

# Quality Assurance Statement - Organization

The statement should include sections on:

- Individuals responsible for quality assurance and quality control
- General approach for conducting analysis
- Quantitative/qualitative procedures to be used to evaluate success
- Data management activities
- Address following, if applicable:
  - Collection of new/primary data, and use of existing/secondary data
  - Scope and application of methods, tests, or measurements
  - Model development or refinement
  - Tools and technology development or operations
  - Survey methodology including rationale for the proposed statistical techniques

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# Evaluation of Responses

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# Intake and Screening

- 1) The SGC receives the bid package through the [contracts@sgc.ca.gov](mailto:contracts@sgc.ca.gov) email address by 5:00 pm (PDT) on April 17th .
- 2) The submission's Proposal Cover Page includes the signature of the Responsible Party.
- 3) All required attachments are submitted as part of the bidder's response.
- 4) The submission is responsive to areas of understanding for California Native American tribes' needs as related to the goals and topic areas described in Section I, Introduction, Program Goals.

# Technical Merits Evaluation Criteria

- The degree to which the bidder has clearly described the overall soundness, adequacy, and completeness of the proposed submission addressing tasks identified in the Program Scope.
- The bid demonstrates clarity in framing potential gaps. It reflects reasonable methods for soliciting tribal input, leading to producing recommendations and strategies for understanding tribal achievements, needs, and aspirations
- The degree to which the project team is qualified by education, training, and/or experience to execute the proposed tasks and products.

# Meaningful Engagement Evaluation Criteria

- The degree to which the bidder proposes to involve California Native American tribes consistent with State Committee guidance and oversight.
- The bid's outreach component reflects a willingness, and ambitious and feasible plan, to engage Tribes through various modes of communication.
- The bid reflects a plan to work with, travel to, and otherwise engage with a diversity of Tribes that exist in California.

# Organizational/Cost Evaluation Criteria

- Organizational and reporting structure of the bidder and project team.
- Key team members, including the project manager and sub-contractors
- Resumes for key participants in the Statewide Gap Analysis project.
- Management and coordination of tasks, and technical expertise of the project manager to support all management activities in the bid.
- Team's history of successfully completing projects and deploying results.
- Project costs - consistency with the proposed work and products to be provided.
- Reasonableness of personnel rates/costs, operating expenses, and overhead for the proposed work and consistency of costs with the experience of the project team.

# Total Cost Evaluation

- A maximum of 50 cost points will be awarded for the total cost of the bid. This criterion evaluates and compares the budgets of each proposal relative to those of its competitors.
- Proposer's cost score calculation: based on the ratio of the lowest cost proposal to the Proposer's cost, multiplied by the maximum number of cost points available, as shown in the calculation below:

**Lowest Total Cost Proposal x 50 Total Cost Points Possible ÷ Proposer Total Cost**

<b>BIDDER</b>	<b>GRAND TOTAL COST</b>	<b>CALCULATION</b>	<b>POINTS AWARDED</b>
<b>A</b>	\$40,000	$\$30,000 \times 50 / \$40,000$	37.5
<b>B</b>	\$35,000	$\$30,000 \times 50 / \$35,000$	42.9
<b>C</b>	\$30,000	$\$30,000 \times 50 / \$30,000$	50.0





# Scoring

EVALUATION CRITERIA	SCORING WEIGHT
Technical Merits	30
Meaningful Engagement	40
Organizational Capacity and Cost Effectiveness	30
Cost Evaluation	50
<b>Total Points Available</b>	<b>150</b>



# Business Programs



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# Disabled Veteran Business Enterprise (DVBE)

A minimum amount of DVBE participation is not required. However, you are encouraged either to become certified, if eligible, or to subcontract a portion of the work to a certified DVBE.

A disabled veteran is a veteran of the U.S. military, naval, or air service that incurred a service-connected disability of at least 10% or more; and is domiciled in California.

Participation Requirement (two paths):

- Bidder is a DVBE and commits to performing at least 3% of the contract with the Bidder's firm, or in combination with other DVBE(s); or,
- Commit to use certified DVBE subcontractors for at least 3% of the contract

Proposed DVBE Participation Level	DVBE Incentive % Point Preference*	DVBE Incentive Points
3.01% - 3.99%	1%	1 (CO fill in points based on total points possible for RFP)
4.00% - 4.99%	2%	2 (CO fill in points based on total points possible for RFP)
5.00% - 5.99%	3%	3 (CO fill in points based on total points possible for RFP)
6.00% - 6.99%	4%	4 (CO fill in points based on total points possible for RFP)
7.00% or over	5%	5 (CO fill in points based on total points possible for RFP)

# Small Business / Microbusiness / Non-Small Business

- 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.
- A business must be formally certified by the Department of General Services, Office of Small Business and DVBE Services (OSDS), in order to receive the small/microbusiness preference.

# Target Area Contract Preference Act

- The TACPA program was established to stimulate economic growth and employment opportunities in designated Areas throughout the state of California.
- The Department of General Services (DGS), Procurement Division (PD), Dispute Resolution Unit (DRU) oversees the TACPA program and evaluates all TACPA applications.
- This RFP contains (TACPA) preference request forms. Please carefully review the forms and requirements. Bidders are not required to apply for these preferences. Denial of the TACPA preference request is not a basis for rejection of the bid.

# Key Activities and Dates

ACTIVITY	DATE	REVISED DATE
Pre-Bid Webinar	3/25/2020	
Deadline for Written Questions	3/30/2020	
<b>Deadline to Submit Proposals by 5:00 PM PDT</b>	<b>4/17/2020</b>	
Proposal evaluation period	4/18/2020 – 5/04/2020	
Notice of Intent to Award Posted (5 Business Days)	5/06/2020 – 5/12/2020	
DGS Review and Approval (20 Business Days)	5/13/2020 – 5/26/2020	5/13/2020 – 6/12/2020
Anticipated Begin Date (Upon DGS Approval)	5/27/2020	7/1/2020
Tribal Energy and Climate Conference	Fall 2020	
Review Committee Meetings	7/01/2020 – 3/31/2022	
End Date	3/31/2022	

# Bidder's Admonishments

## ELIGIBILITY

In order to be eligible for consideration, bids must comply with all governing instructions including the requirement to submit a firm quotation, adhere to format and style guidelines, include technical information, and provide all of the materials or components that comprise a complete submission package.

## BIDDER RESPONSIBILITIES

- Carefully read the entire RFP,
- Submit questions in a timely manner, if clarification is necessary,
- Electronically submit all required responses by the specified dates and times,
- Ensure that all procedures and requirements of the RFP are accurately followed and fully addressed, and
- Ensure the Proposal is free of errors and fully responds to the required information



# Bidder Response: Labeling and Packaging

## Submission Email

1. Only electronic responses to this RFP will be accepted
2. Send response to [contracts@sgc.ca.gov](mailto:contracts@sgc.ca.gov)
3. The body of the email must include:
  - Bidder's Name
  - Organization
  - Contact Information (email, telephone, and address)
  - The RFP Number  **[#SGC19155]**

## Submission Attachments

The email must include the following attachments:

- Proposal Cover Page
- Table of Contents
- Scope of Work and Schedule
- Project Team Qualifications
- Previous Work Products
- References
- Budget Forms and Information
- Quality Assurance Statement
- Contracting Forms (See attachments C through I)



# Additional Information

Send additional questions to: [contracts@sgc.ca.gov](mailto:contracts@sgc.ca.gov)

All documents and information on the Statewide Gap Analysis Request for Proposal (RFP) can be found at:

- CEC Tribal Programs

<https://www.energy.ca.gov/programs-and-topics/programs/tribal-program/tribal-government-challenge>

- Cal eProcure

<https://caleprocure.ca.gov/event/0650/0000015872>

# Questions?

*Please type into Chat Box*

*Direct other questions to:*

**Blake Deering, Senior Contracts Liaison**

California Strategic Growth Council  
1400 Tenth Street | Sacramento, CA 95814  
(916) 322-3714  
*[contracts@sgc.ca.gov](mailto:contracts@sgc.ca.gov)*



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# Back Up Slides

## Instructions and Templates



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# Submission Formatting

- Font: 11-point, Arial (excluding Microsoft Excel spreadsheets, original template headers and footers, and commitment or support letters).
- Margins: No less than one inch on all sides (excluding headers and footers).
- Spacing: Single-spaced, with a blank line between each paragraph.
- Pages: Numbered and printed double-sided (when determining page limits, each printed side of a page counts as one page).
- Signatures: Electronic (manual signature requirement revoked).
- File Format: Microsoft Word version 2007 or later (.doc or .docx format) or PDF files, excluding Microsoft Excel spreadsheets and commitment or support letters.

# Submission Page Limits

- Proposal Cover Page: One-page
- Table of Contents: One-page
- Scope of Work and Deliverables Schedule: Ten-pages, including figures, tables, graphics and charts
- Project Team Qualifications: One-page description of the project team and One-page resume for each key participant in the gap analysis project
- Previous Work Products: Two-pages per related project in portfolio
- References: One-page for each reference, three maximum

# Budget Template

Bidder Name:		From:				7/1/2020	7/1/2021	6/30/2021		6/30/2022	TOTAL
		To:				Year 1		Year 2			
BUDGET CATEGORY											
PERSONNEL: <i>Salary and fringe benefits.</i>							\$0		\$0	\$0	
First	Last	Classification	Salary	Benefit Rate	Time (Hr/%)	Time	Amount	Time	Amount		
							\$0		\$0	\$0	
							\$0		\$0	\$0	
							\$0		\$0	\$0	
							\$0		\$0	\$0	
TRAVEL							\$0		\$0	\$0	
			Type: day/night/miles	Rate		#	Amount	#	Amount		
Hotel							\$0		\$0	\$0	
Airfare							\$0		\$0	\$0	
Per Diem							\$0		\$0	\$0	
Mileage							\$0		\$0	\$0	
Ground Transportation							\$0		\$0	\$0	
MATERIALS & SUPPLIES						0.00	\$0	0.00	\$0	\$0	
EQUIPMENT						0.00	\$0	0.00	\$0	\$0	
CONSULTANT						0.00	\$0	0.00	\$0	\$0	
SUBRECIPIENT						0.00	\$0	0.00	\$0	\$0	
OTHER DIRECT COSTS (ODC)											
			ODC #1			0.00	\$0	0.00	\$0	\$0	
			ODC #2			0.00	\$0	0.00	\$0	\$0	
			ODC #3			0.00	\$0	0.00	\$0	\$0	
TOTAL DIRECT COSTS						0.00	\$0	0.00	\$0	\$0	
Indirect (F&A) Costs						0.00					
						0.00	\$0	0.00	\$0	\$0	
TOTAL COSTS PER YEAR						0.00	\$0	0.00	\$0	\$0	
TOTAL COSTS FOR PROPOSED PROJECT PERIOD										\$0	

## BUDGET JUSTIFICATION

### Personnel

**Name.** Starting with the Project Manager, list the names of all known personnel who will be involved on the project for the proposed project period. Include all collaborators, individuals in training, technical and support staff or include as "to be determined" (TBD).

**Role on Project.** For all personnel by name, position, function, and a percentage level of effort (as appropriate), including "to-be-determined" positions.

### Fringe Benefits.

Explain the costs included in the budgeted fringe benefit percentages used.

### Travel

Itemize all travel requests separately by trip and justify in accordance with State travel guidelines. Provide the purpose, destination, travelers (name or position/role), and duration of each trip. Include detail on airfare, lodging and mileage expenses, if applicable. Should the application include a request for travel outside of the state of California, justify the need for those out-of-state trips separately and completely. State policy requires a "mission critical" purpose for approving travel outside of California.

### Materials and Supplies

Itemize materials supplies in separate categories. Include a complete justification of the project's need for these items. Theft sensitive equipment (under \$5,000) must be justified and tracked separately in accordance with State Contracting Manual Section 7.29. All outreach and engagement costs should be included under this category. Please note: The State will not reimburse a vendor for meals, snacks, etc. provided as part of outreach.

### Equipment

Equipment is NOT an eligible cost for this contract.

### Consultant Costs

Consultants are individuals/organizations who provide expert advisory or other services for brief or limited periods and do not provide a percentage of effort to the project or program. Consultants are not involved in the direction of the project as a whole.

Provide the names and organizational affiliations of all consultants. Describe the services to be performed, and include the number of days of anticipated consultation, the expected rate of compensation, travel, per diem, and other related costs.

### Sub-Contractor Costs

Each participating sub-contractor must submit a separate detailed budget for the project period. Include a complete justification for the need for any contractor listed in the response to the RFP.

### Other Direct Costs

Itemize any other expenses by category and cost. Specifically justify costs that may typically be treated as indirect costs. For example, if insurance, telecommunication, or IT costs are charged as a direct expense, explain reason and methodology

# Scope of Work Template

The Scope of Work (or work plan) and Schedule should provide sufficient detail for a reader to understand how the tasks will progress. The scope must identify specific information about the flow of work, break down how the stages (or tasks) will occur, define a list of expected interim and final deliverables responsive to the deliverables outlined in the tasks above, and propose a timeline that anticipates the timing of each stage and when milestones or outcomes are expected to occur. This document should present information in a segmented fashion that contains a graphic timeline, as well as a table of objectives, activities, and responsibilities. The elements of the Scope of Work should include:

Background. Provide overarching statements that characterize the goals, objectives, and actions related to the purpose of the Gap Analysis; and any practical information, technological requirements or specifications, and legal limitations that may apply.

Specific Tasks or Phases of Work. Outline the specific tasks (or phases) that are being proposed, breaking down the order of how each stage will occur, and tying each segment to objectives, approaches, methodologies, and/or strategies that will be employed:

- Describe the items, products, or results to be delivered
- Discuss the roles and responsibilities of the Bidder, and/or sub-contractors
- Identify planned outreach or engagement
- Provide information about delivery of completed progress reports, interim and final products, or other applicable materials

Timeline and Schedule of Deliverables. Submit a chart that identifies performance timelines or completion dates and includes anticipated start and completion times for each task/phase of the project. In addition, include a schedule of deliverables that indicates the expected completion date for each task deliverable. Please use the template below for the schedule of deliverables.

Task	Deliverable	Description	Due Date





# RFP – Attachments

Appendix A: Scope of Work and Schedule

Appendix B: Budget Forms and information

Appendix C: Exhibit B Introduction and Budget Terms

Appendix D: Standard Contract Agreement (STD 213)

Appendix E: General Terms and Conditions

Appendix F: Special Terms and Conditions

Appendix G – Payee Data Record

Appendix H: Darfur Contracting Act

Appendix I: DVBE Forms