Building Initiative for Low-Emissions Development (BUILD) Technical Assistance Provider

Request for Proposals: RFP-20-502 Pre-Bid Conference

Myoung-Ae Jones
Date: May 25, 2021
Renewable Energy Division
Housekeeping

• All participants are muted upon entering this meeting
• Questions will be taken during the Q&A session after presentation
• If you have questions during the presentation, please submit using the Q&A function and we will address them during the Q&A session
• Order of the Q&A session: live questions first, then questions submitted through the Q&A function
Agenda

Presentation
• Introduction to BUILD
• RFP
  • Purpose and Background
  • Available Funding & Contract Duration
  • Scope of Work
• Application and Submission
  • Application Requirements and Attachments
  • Submission and Evaluation Process
• Next Steps

Questions & Answer
• Additional Questions Submission

Adjourn
## BUILD Program At a Glance

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Incentive Program for building decarbonization</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td>Deploy near-zero emission building technologies to reduce GHG emission (while ensuring no negative bill impact for low-income occupants)</td>
</tr>
<tr>
<td><strong>Budget</strong></td>
<td>$80 million</td>
</tr>
</tbody>
</table>
| **LI/DAC Component**  | • ≥ $60 million for new low-income residential housing incentive  
                       • Technical assistance  
                       • Outreach and Education |
| **Project Eligibility**| • All-electric new construction  
                       • Located in gas IOU territory |
| **Income Eligibility**| • Multifamily:  
                       • At least 2 deed-restricted units AND  
                       • In DAC/LI community OR 80% of units are 60% or less AMI  
                       • Individual low-income residence §2852(a)(3)(C) Public Utilities Code |
| **Evaluation**        | • Two years after program initiation by independent evaluator  
                       • Program data EM&V  
                       • Potential expansion to market-rate housing & other foci |
Change Drivers

- Building sector is second largest emitter of GHGs in CA
- Largest source of GHG emissions in the building: space and water heating
- Need to achieve higher GHG emissions reduction in the buildings sector above Title 24 requirements

\[\text{Pilot Building Decarbonization Program to Incentivize All-Electric Building Projects}\]

\[\text{Market Transformation}\]
BUILD Development Timeline

- **2018 Sep.** SB 1477 is approved by the Governor establishing the BUILD Program &TECH Initiative
- **2019 Jan.** Workshops
- **2019** CPUC institutes building decarb rulemaking (R.19-01-011)
- **2020 Mar.** CPUC adopts Decision establishing framework and requirements (D.20-03-027)
- **2020 Jul.** CEC publishes BUILD Implementation Plan
- **2021 Apr.** CEC anticipates to release draft guidelines and public workshops
- **2021 May** CPUC approved BUILD Implementation Plan
- **2021 Fall** Technical Assistance RFP release
- **End of 2021** CEC anticipates program launch
Purpose of RFP

Select a Technical Assistant Provider

A full-service Prime Contractor that demonstrates technical, field, administrative and project management experience and competence in:

- a) education and outreach activities
- b) low-emissions building design and equipment expertise
- c) building decarbonization incentive programs

TA Provider will help ensure technical assistance is available to all prospective applicants for new low-income residential building projects
RFP Funding and Duration

- Funding: $6 Million (option to add $2 Million)
  Funding Source: SB 1477
  GHG emission allowances allocated to gas corporations

<table>
<thead>
<tr>
<th>Natural Gas Utility Territory</th>
<th>Allocated Percent of Budget and Program Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern California Gas Company</td>
<td>49.26%</td>
</tr>
<tr>
<td>Pacific Gas and Electric Company</td>
<td>42.34%</td>
</tr>
<tr>
<td>San Diego Gas &amp; Electric Company</td>
<td>6.77%</td>
</tr>
<tr>
<td>Southwest Gas Corporation</td>
<td>1.63%</td>
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</tbody>
</table>

- Contract Duration: 4 years (option to add 2 more years)

 ➢ Submit Budget for 6 years
## Key Activities and Dates

<table>
<thead>
<tr>
<th>Activity</th>
<th>Anticipated Date</th>
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<tbody>
<tr>
<td>RFP Release</td>
<td>May 17, 2021</td>
</tr>
<tr>
<td>Pre-Bid Conference</td>
<td>May 25, 2021</td>
</tr>
<tr>
<td>Written Questions Submittal Deadline*</td>
<td>May 26, 2021 by 5:00 p.m. P.T.</td>
</tr>
<tr>
<td>Distribute Questions/Answers and Addenda (if any) to RFP</td>
<td>Week of May 31</td>
</tr>
<tr>
<td><strong>Deadline to Submit Proposals</strong>*</td>
<td><strong>June 14, 2021 by 5:00 p.m. P.T.</strong></td>
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<td>Clarification Interviews (if Necessary)</td>
<td>Week of June 14 or 21, 2021</td>
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<td>July 15, 2021</td>
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<td>Contract Start</td>
<td>August 2021</td>
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Overview of Administrative Task

• Kickoff Meeting
• Invoices
• Manage Subcontractors
• Periodic Progress Reports
• Quarterly Work Plans
• Final Report
• Complete Required Trainings
Overview of Technical Tasks

Task 2: Education & Outreach
- Fact Sheets & One Pagers
- Web Presence and webinars
- Industry Outreach

Task 3: Technical Assistance for Potential Applicants
- Provide suite of TA to all building design & construction phases
- TA intake interviews
- Assist with incentive layering
- Assist with BUILD incentive application

Task 4: Tech Assistance to CEC
- Serve as a continuous feedback
- Assist CEC staff with technical aspects of program implementation
- Provide research & analysis on program design
- Work Authorization

Task 5: Support for EM&V Efforts
- Coordinate with and provide information to the independent evaluator
- Assist BUILD staff with collecting and furnishing required data
- Work Authorization
Task 2: Education and Outreach

• Develop TA Outreach and Education Plan
• Conduct outreach campaign
• Develop educational materials, factsheets, and web content
• Develop and provide educational webinars
• Develop and maintain web-based resources
• Coordinate with the TECH Initiative
Task 3: Technical Assistance for Potential Applicants

- General BUILD Technical Assistance
- Assistance with Residential Building Decarbonization Design
- Assistance with completing the BUILD Incentive Application Process and Project Completion
Task 4: Tech Assistance to CEC

- Assist with program implementation
- Research and analysis on program design: low-income residential development, building technologies, energy consumption and conservation, utility bills
- Provide feedback from applicants and wider housing sector for program adjustments
- Technical assistance for implementing program modification
- Work Authorization: Market Analysis of CA residential building sector
Task 5: Support for EM&V Efforts

• Assist BUILD staff with collecting and furnishing data required for program evaluation
• Coordinate with, and provide information to, the independent evaluator
• Work Authorization
Applicant Eligibility

• Open Solicitation: all public & private entities with the required technical expertise and experience are eligible to submit proposals

• Submit as a single entity

• Registered and in good standing with the CA Secretary of State
Proposal Requirements

Prime Contractor is responsible for submitting the proposal

• Consists of Two Sections

Section 1 – Administrative Response

Section 2 – Technical and Cost Proposal
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)*
- Disabled Veteran Business Enterprise Form (Attachment 3)
- Bidder Declaration Form GSPD-05-105 (Attachment 4)
- Contractor Certification Clauses (Attachment 5)
- TACPA Forms *(if applicable)*
- Iran Contracting Act Form (Attachment 9)
- CA Civil Rights Laws Certification (Attachment 10)
This RFP is subject to a mandatory certified DVBE participation of at least three percent (3%).

Can be satisfied by the Applicant or certified DVBE subcontractor.

Preference points: DVBE participation above 3% (1 pt), with maximum of 5 points (7% or over).

Relevant Attachments: Attachments 1, 3, and 4.

Please refer to the solicitation manual, section V.
Section 2: Technical and Cost Proposal

• Approach to Tasks in Scope of Work
• Organizational Structure
• Relevant Experience and Qualifications
• Labor Hours by Personnel and Task
• Client References *(Attachment 6)*
• Previous Work Products
• Budget Forms *(Attachment 7)*
Section 2: Cost Proposal

Complete and include the budget forms found in Attachment 7 of the solicitation.

• Category Budget
• Direct Labor
• Fringe Benefits
• Travel
• Equipment
• Materials & Miscellaneous
• Subcontracts
• Indirect Costs and Profit
• Loaded Hourly Rate Calculation
• Total Expected Labor Cost
Budget (Attachment 7)

- Identifies how the CEC funds will be spent to complete the tasks
- All subcontractors must complete a separate budget
- Enter job classifications on **General Classifications** tab
- Ensure all personnel/classifications are included
- Ensure that all rates provided are **maximum rates** for the entire project term

➢ Submit for the full extended term of 6 years
Opportunity to explain the entirety of your proposal. The narrative should explain:

- What is your approach and how will each major task be performed?
- How will the tasks be completed in the term proposed?
- What are your teams’ capabilities and history of success for completing similar tasks/contracts?
- Read the evaluation criteria carefully and respond accordingly.
Submission through Grant Solicitation System (GSS)

- **Electronic submission only**: [https://gss.energy.ca.gov/](https://gss.energy.ca.gov/)
  - Register and test run
  - File size: Maximum 50 MB
  - File name length: Maximum 64 characters
  - Won’t allow submission after deadline

- **Helpful Resources**
  - Grant Solicitation System (GSS) Help doc [https://www.energy.ca.gov/sites/default/files/2019-09/Grant_Solicitation_System_Help.pdf](https://www.energy.ca.gov/sites/default/files/2019-09/Grant_Solicitation_System_Help.pdf)
  - General Funding Resources [https://www.energy.ca.gov/funding-opportunities/funding-resources](https://www.energy.ca.gov/funding-opportunities/funding-resources)
Proposal Evaluation Process

Administrative Screening
Requirements & Completeness
Pass/Fail
Fail = disqualification

Technical & Cost Evaluation
Minimum Passing Score: 70 pts

Preferences
DVBE
Small Business
Non-Small Business
Target Area Contract Preference Act
Some Reasons for Disqualification During Administrative Screening

• Proposal package is incomplete
• Required Attachments/documents are missing
• The applicant has included a statement that they will not accept the terms and conditions
• Proposal package contains confidential materials
## Proposal Evaluation Criteria

<table>
<thead>
<tr>
<th>Technical Criteria</th>
<th>Possible Points</th>
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<tbody>
<tr>
<td>Bidder's Organizational Structure</td>
<td>5</td>
</tr>
<tr>
<td>Bidder's Administrative Capabilities</td>
<td>5</td>
</tr>
<tr>
<td>Bidder and Subcontractor Qualifications and Team Member Experience and Capabilities by Task</td>
<td>10</td>
</tr>
<tr>
<td>Previous Work Products</td>
<td>5</td>
</tr>
<tr>
<td>Team Qualifications for Providing Education, Outreach and Stakeholder Engagement Support to the BUILD Program</td>
<td>10</td>
</tr>
<tr>
<td>Team Qualifications for Providing Technical Assistance for Potential BUILD Incentive Program Participants</td>
<td>15</td>
</tr>
<tr>
<td>Team Qualifications for Providing Technical Support and Subject Matter Expertise to the BUILD Program Staff</td>
<td>10</td>
</tr>
<tr>
<td>Team Qualifications for Supporting BUILD Program Evaluation, Measurement and Verification (EM&amp;V) Activities</td>
<td>5</td>
</tr>
<tr>
<td>Team Qualifications: Data Development and Management Skills</td>
<td>5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>70</strong></td>
</tr>
<tr>
<td><strong>Total Expected Labor Costs</strong></td>
<td><strong>30</strong></td>
</tr>
<tr>
<td><strong>Minimum Points to Pass</strong></td>
<td><strong>70</strong></td>
</tr>
<tr>
<td>Preference Points to Passing Proposals</td>
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Contract Development and Execution

Notice of Proposed Award

Shows proposed funding amounts and rank order of applicants

Contract Development

Proposal documents will be processed into a legal agreement

Contract Start

Recipients may begin work on the project **only** after the agreement is fully executed
Question and Answer

• Please “raise your hand” to be called
• Type your question in the Q&A window
• Call-ins: press *9 to raise your hand, *6 to mute/unmute
• Please limit questions to this RFP
• Please remember to introduce yourself by stating your name and affiliation
• Please keep questions under 3 minutes to allow time for others
• Official response will be given in writing and posted on the RFP webpage
Additional Questions

Please send all questions related to RFP-20-502 to:

Phil Dyer
Commission Agreement Officer
916-891-8474
Phil.Dyer@Energy.ca.gov

Deadline for Questions: May 26, 5 p.m. P.T.

➢ Q&A Posting/Addenda (if any): Week of May 31
Thank You & Stay Engaged

Please visit the BUILD webpage:

And sign up for our list serve!
Or email us at BUILDunit@energy.ca.gov