**REQUEST FOR PROPOSALS**

**Demand Scenarios Project**

**ADDENDUM 1**



RFP-22-803

www.energy.ca.gov/contracts/

State of California

California Energy Commission

[~~December 2022~~] January 2023

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2. Darfur Contracting Act
3. DVBE Std. 843
4. Bidder Declaration form GSPD-05-105
5. Contractor Certification Clauses
6. Client References
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8. Standard Agreement Example
9. Iran Contracting Act Form
10. California Civil Rights Law Certification

11. Work Authorization Example

# I. Introduction

**NOTE ABOUT SIGNATURES**

The CEC may have waived the requirement for a signature on application materials for this solicitation for submissions. If a notice, regarding CEC’s waiver of the signature requirement appears here: <https://www.energy.ca.gov/funding-opportunities/solicitations>, the waiver applies to this solicitation. In the event of a conflict between the notice and any language in this solicitation regarding signatures, the notice will govern.

Even if the requirement for signatures has been waived, applicants are still expected to adhere to the requirements of this solicitation as if they had signed.

## Purpose of RFP

The purpose of this Request for Proposals is to hire an experienced, full-service Contractor team (composed of a Contractor and Subcontractors) that can provide technical assistance on the recent CEC Demand Scenarios Project. Demand scenarios and their assessments provide objective, independent information and are vital inputs into setting or periodically reassessing California’s energy and GHG emission reduction goals. These scenario assessments can provide a sense of how easy or difficult it may be to achieve those goals and provide insights into the need for incentives or programs that target customers and industries that may not adapt through market forces alone.

The technical assistance includes, but is not limited to, adapting the existing Adapted-PATHWAYS Model or creating a new model to make annual energy demand projections by electric planning area covering the entire state that reflects user-defined input assumptions, forecasting annual energy demand projections for various sectors and fuels, and their corresponding GHG emissions; translating annual electric energy projections into 8760 hourly load projections by CEC planning areas; assessing demand flexibility and DER potential; helping staff develop the framework for long-term statewide energy demand scenarios; and managing any subcontractor products.

The contractor hired under the Request for Proposals will also provide technical assistance to Energy Commission staff in efforts to develop various types of scenarios, including additional measures incorporated into GHG emission reduction planning by the California Air Resources Board (CARB) in their 2022 Scoping Plan Scenario and incorporated into energy planning by the California Public Utilities Commission (CPUC) in their 2023 Integrated Resources Plan.

The Energy Commission is seeking a prime Contractor applying as a single entity or representing a team of companies. A single company, not a group of representatives from different companies, must submit a proposal as the prime Contractor. The prime Contractor will be responsible for all contract duties, directing team members in all contract provisions, and also participating in technical work assignments.

## 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.

**Note:** Added language appears in **bold underline**, and deleted language appears in [~~strikethrough~~] and within square brackets.

|  |  |
| --- | --- |
| **ACTIVITY** | **ACTION DATE** |
| RFP Release | 12/30/22 |
| Pre-Bid Conference \* | 01/12/23 |
| Deadline for Written Questions **by 5:00 p.m.** \* | 01/13/23 |
| Distribute Questions/Answers and Addenda (if any) to RFP | 01/20/23 |
| **Deadline to Submit Proposals by 5:00 p.m. \*** | [~~02/03/23]~~ **02/07/23** |
| Clarification Interviews, if needed | Week of 2/13/23 |
| Notice of Proposed Award  | 02/24/23 |
| Commission Business Meeting | 04/12/23 |
| Contract Start Date | 05/12/23 |
| Contract Termination Date | 03/31/25 |

## Available Funding and How Award is Determined

There is $500,000 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.

This contract will have a ceiling value of $1.5M; however, CEC commits to initial funding of only $500K to support analysis in the scope of this contract. CEC may add funding beyond the current $500K, and up to $1.5M, as funding becomes available.

The Energy 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 Energy 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 is an open solicitation for public and private entities. Each agreement resulting from this solicitation includes terms and conditions that set forth the Contractor’s rights and responsibilities. Private sector entities must agree to use the attached standard terms and conditions (Attachment 8). The University of California, California State University or U.S. Department of Energy National Laboratories must use either the standard or the pre-negotiated terms and conditions located at: ([DGS Lab Terms](https://www.dgs.ca.gov/OLS/Resources/Page-Content/Office-of-Legal-Services-Resources-List-Folder/Contracts-with-the-Department-of-Energy-Laboratories#@ViewBag.JumpTo)). The Energy Commission will not award agreements to non-complying entities. The Energy Commission reserves the right to modify the terms and conditions prior to executing agreements.

All corporations, limited liability companies (LLCs), limited partnerships (LPs) and limited liability partnerships (LLPs) that conduct intrastate business in California are required to be registered and in good standing with the California Secretary of State prior to its project being recommended for approval at an Energy Commission Business Meeting. If not currently registered with the California Secretary of State, bidders are encouraged to contact the Secretary of State’s Office as soon as possible to avoid potential delays in beginning the proposed project(s) (should the application be successful). For more information, contact the Secretary of State’s Office at [SOS Website](http://www.sos.ca.gov/). Sole proprietors using a fictitious business name must be registered with the appropriate county and provide evidence of registration to the Energy Commission prior to their project being recommended for approval at an Energy Commission Business Meeting.

## 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 CEC’s website at [CEC Website](http://www.energy.ca.gov/) to confirm the date and time.

January 12, 2023

10:00 am – 12:00 pm

California Energy Commission

Zoom Only

**Zoom Instructions**:

To join the Zoom meeting, go to <https://zoom.us/join> and enter the Meeting ID below and select “join from your browser.” Participants will then enter the meeting password listed below and their name. Participants will select the “Join” button.:

**Join Zoom Meeting**:

https://energy.zoom.us/j/97422413049?pwd=MHpFcytlSXlJZVVhRE5wY1F1RHpaZz09

**Meeting ID**: 974 2241 3049

**Passcode**: 529977

**Topic**: Pre-bid Conference: Demand Scenarios Project Technical Support

**Telephone Access Only:**

For iPhone one-tap :

 US: +16692192599,,97422413049# or +12133388477,,97422413049#

Or Telephone Dial:

US: +1 669 219 2599 or +1 213 338 8477 or +1 346 248 7799 or +1 602 753 0140 or +1 720 928 9299 or +1 971 247 1195 or +1 206 337 9723 or +1 929 436 2866 or +1 646 518 9805 or +1 651 372 8299 or +1 786 635 1003

Webinar ID: 974 2241 3049

International numbers available: [https://gcc02.safelinks.protection.outlook.com/?url=https://energy.zoom.us/u/ac4VuJwZYj&data=05|01||66f2ac36d78443fd37ef08dac8e42ae1|ac3a124413f44ef68d1bbaa27148194e|0|0|638043179545366092|Unknown|TWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0=|3000|||&sdata=bdlmbaumW5/wj/Dr49wBxlMzwC6AWEgVO6mfNIY5b5E=&reserved=0](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fenergy.zoom.us%2Fu%2Fac4VuJwZYj&data=05%7C01%7C%7C66f2ac36d78443fd37ef08dac8e42ae1%7Cac3a124413f44ef68d1bbaa27148194e%7C0%7C0%7C638043179545366092%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=bdlmbaumW5%2Fwj%2FDr49wBxlMzwC6AWEgVO6mfNIY5b5E%3D&reserved=0)  <https://energy.zoom.us/u/kdGhVGZmmi>

## 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 questions must be received by 5:00 pm on the day of the Pre-Bid Conference.

The questions and answers will be posted on the Commission’s website at: [CEC Solicitations Webpage](https://www.energy.ca.gov/funding-opportunities/solicitations).

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

Natalie Johnson, Commission Agreement Officer

California Energy Commission

715 P Street, MS-18

Sacramento, California 95814

Telephone: (916) 891-8523

E-mail: natalie.johnson@energy.ca.gov

## Responses to this RFP

Responses to this solicitation shall be in the form of an Administrative, Technical and Cost Proposal according to the format described in this RFP. The Administrative response shall include all required administrative documents. 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:

* **Demand Scenarios**
	+ [ADOPTED Final 2021 Integrated Energy Policy Report Volume IV California Energy Demand Forecast](https://efiling.energy.ca.gov/GetDocument.aspx?tn=241581), Chapter 4
	+ Demand scenario assumptions and results were presented at the IEPR workshop on April 7 and can be found at the link below: <https://www.energy.ca.gov/event/workshop/2022-04/iepr-staff-workshop-demand-scenarios>
* Senate Bill 100 (De León, Chapter 312, Statutes of 2018)

[Text of SB 100](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201720180SB100)

* CARB Scoping Plan Documents

<https://ww2.arb.ca.gov/our-work/programs/ab-32-climate-change-scoping-plan/2022-scoping-plan-documents>

* CPUC Integrated Resource Plan and Long Term Procurement Plan (IRP-LTPP)

<https://www.cpuc.ca.gov/irp/>

# 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.

The chosen “Contractor” will assist the Energy Assessments Division by performing the tasks specified in this Scope of Work under the direction of the CEC’s CAM. The CAM will oversee the management and administration of the agreement. The resulting agreement will include defined tasks for Task 1. The Scope of Work will be defined in several Work Authorizations. Additional Work Authorizations (WAs) may be defined on an as-needed basis.. The specific activities and the degree of effort for each activity may vary. Work assigned through WAs will depend on availability of funding as well as the CEC’s demand for service as determined by the CAM.

No work shall be undertaken except for Task 1 unless authorized by the Commission Agreement Manager (CAM) through a specific written document called a “work authorization” (WA).The CAM will prepare and issue the written work authorizations and shall set a maximum price, budget, and schedule for the work to be performed. The CAM will work, in consultation with the Contractor, to assign work to either the Contractor or a Subcontractor.

## Background

In the initial implementation of the CEC Demand Scenarios Project, Advanced Electrification Analysis Branch (AEAB) staff worked to develop a model that relied upon the basic framework of the PATHWAYS model with certain portions bypassed and replaced with projections developed by AEAB staff. This tool is referred to as Adapted-PATHWAYS. The tool was used to develop annual energy demand projections in all customer sectors for all fuels and their GHG emissions for several types of scenarios. This project anticipates retaining the basic approach but improving selected areas and updating most input assumptions from statewide to electric planning area levels to drive model results.

In support of developing demand scenarios that will be included in the 2023 IEPR proceeding as well as the SB100 report, the contractor would either adapt and expand the existing Adapted-PATHWAYS Model or create a new model to make annual energy demand projections by electric planning area covering the entire state that reflects user-defined input assumptions. For electricity, the model will generate annual 8760 hourly load projections out to 2050 for the same planning areas used in the CEC demand forecast. The final Demand Scenarios Model will be a combination of results from the AEAB staff’s energy projections in the residential, commercial, transportation and industrial sectors (electricity and natural gas) and the contractor’s analysis for the remaining fuels in these sectors and all fuels used in the other sectors (transportation-aviation, agriculture, oil and gas, petroleum refining, TCU) for the various scenarios staff envisions for this project.

Staff plans to develop various types of scenarios including additional measures proposed by the California Air Resources Board (CARB) in their 2022 Scoping Plan Scenario and incorporated into energy planning by the California Public Utilities Commission (CPUC) in their 2023 Integrated Resources Plan. Staff will also develop additional sensitivities to reflect the implications of emerging policy innovations to be included in the 2023 IEPR proceeding as well as the SB100 report.

The Contractor shall provide technical assistance for the following tasks, as directed by the CAM

**Tasks Activity**

* Task 1: Agreement Management
* Task 2: Adapt/Develop Demand Scenarios Model & Prepare Reference Scenario Projections
* Task 3: Establish Scenarios ,Develop & Document Projections
* Task 4: Develop Cost Inputs and Projections
* Task 5: Develop Model for Aviation Sub-Sector

## ACRONYMS/GLOSSARY

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

|  |  |
| --- | --- |
| **Acronym** | **Definition** |
| AEAB | Advanced Electrification Analysis Branch |
| Bidder | Respondent to this RFP |
| CAISO | California Independent System Operator |
| CAM | Commission Agreement Manager |
| CAO | Commission Agreement Officer |
| CARB | California Air Resources Board |
| CCS | Carbon Capture & Storage |
| CEC | California Energy Commission |
| CED | California Energy Demand |
| CPUC | California Public Utilities Commission |
| DER | Distributed Energy Resource |
| DGS | Department of General Services |
| DVBE | Disabled Veteran Business Enterprises |
| GHG | Greenhouse Gas |
| PM | Program Manager |
| IEPR | Integrated Energy Policy Report |
| NOPA | Notice of Proposed Award, a public notice by the Energy Commission that identifies award recipients |
| Proposal | Formal written response to this document from Bidder |
| RFP  | Request for Proposals |
| State | State of California |
| SB 100 | Senate Bill 100 – The 100 Percent Clean Energy Act of 2018 |
| TCU | Transportation, Communications, and Utilities |
| WA | Work Authorization |

**General Requirements or Goals and Objectives**

The objective of this work authorization contract is to provide technical assistance to the Energy Assessments Division (EAD) by adapting and expand the existing Adapted-PATHWAYS Model or create a new model to make annual energy demand projections by electric planning area covering the entire state that reflects user-defined input assumptions. For electricity, the model will generate annual 8760 hourly load projections out to 2050 for the same planning areas used in the CEC demand forecast. The CEC will be the sole and exclusive owner and copyright holder of any and all models developed as part of Tasks 2 - 5 as described in paragraph 2 of Exhibit E.

**TASK 1- Administrative Tasks**

**Task 1.1 Kick-off Meeting**

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

Expected Total Hours: 20

Expected General Classifications: Analyst, Scientist, Engineer, Project Manager, Director.

**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 via Zoom or teleconference. 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.
* Arrange the meeting including scheduling the date and time.
* Provide a draft agenda to the CAM for review.
* Provide a final agenda to all potential meeting participants prior to the kick-off meeting.

**The CAM shall:**

* Review and approve the draft agenda from the contractor prior to the kick-off meeting.
* Coordinate with all relevant CEC staff to participate in the kickoff meeting.

**Deliverables:**

* Draft and Final Agendas.
* Summary of the kickoff to be included in the monthly progress report.

**Task 1.2 Invoices**

Expected Total Hours: 40

Expected General Classifications: Accountant, Analyst, Scientist, Engineer, Project Manager

**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:**

**•** Monthly invoice (to be included with monthly progress reports)

**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.

Expected Total Hours: 50

Expected General Classifications: Project Manager, Director

**The Contractor shall:**

Manage and coordinate Subcontractor activities. The Contractor is responsible for the quality of all Subcontractor work and the CEC 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.

Expected Total Hours: 60

Expected General Classifications: Analyst, Scientist, Engineer, Project Manager

**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 Work Authorizations**

The goal of this task is to develop and manage all technical and budgetary aspects of work authorizations (WA) in accordance with the requirements of this Agreement for work to be performed under Technical Tasks 2 through 5.

Expected Total Hours: 60

Expected General Classifications: Analyst, Scientist, Engineer, Project Manager, Director

**The Contractor shall:**

* + Help prepare WAs in accordance with the contract requirements.
	+ The WA format and content shall be specified by the CAM.
	+ The WA end date should be no later than 60 days prior to the term end date of the Agreement.
	+ Submit all required WA Documents to the CAM.
	+ Administer WAs
	+ Establish and maintain contractual agreements with entities performing work.
	+ Develop project schedules.
	+ Manage Subcontractor activities in accordance with the Agreement terms and conditions.
	+ Provide oversight and first-level review of reports and documentation, and comment on the content of deliverables.
	+ Review and approve all WA invoices.
	+ Provide audit and accounting services for all WAs.
	+ Immediately report any significant variances affecting performance of WAs and recommend mitigation actions for consideration by the Project Manager and CAM. Examples of significant variances include the inability to submit deliverables by key WA due dates, unavailability of key personnel that will affect timely submittal of deliverables, and key technical issues that would require change in scope, redirection of the effort, or discontinuation of the project.
	+ Coordinate with the CAM to close out completed WAs and remaining unallocated balances.
	+ Monitor and track each WA and the overall agreement.
	+ Provide updated WA project schedules, as needed, and determine if each WA is on schedule and deliverables are satisfactory.
	+ Determine the fiscal status of each WA and the overall Agreement.
	+ Prevent cost overruns.
	+ Track the start, progress, and closure of each WA.

**Deliverables:**

WA Documents

**Task 1.6 Final Report**

Expected Total Hours: 50

Expected General Classifications: Project Manager, Director

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 CEC 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.

**Deliverables:**

Final Reports

**TECHNICAL TASKS:**

**Task 2: ADAPT/DEVELOP DEMAND SCENARIOS MODEL & PREPARE REFERENCE SCENARIO PROJECTIONS**

Expected Total Hours: 1000

Expected General Classifications: Analyst, Scientist, Engineer, Project Manager

In support of developing demand scenarios as part of the 2023 IEPR proceeding and used within the SB100 proceeding, the contractor shall either further adapt the existing Adapted-PATHWAYS Model or create a new model to make annual energy demand projections from 2022 to 2050 by electric planning area covering the entire state that reflects user-defined input assumptions. The final Demand Scenarios Model will be a combination of results from the AEAB staff’s energy projections in the residential, commercial, transportation and industrial sectors (electricity and natural gas) and the contractor’s analysis for the remaining fuels in these sectors and all fuels used in the other sectors (transportation-aviation, agriculture, oil and gas, petroleum refining, TCU) for the various scenarios staff envisions for this project.

The staff and contractor will first work to develop the framework for the scenarios. For the demand scenarios model, developing the level of disaggregation, the fuels to be covered in each economic sector, the nature and level of granularity of the staff-supplied projections in the sectors identified above, and the contractor-developed sectors/fuels projections is required. Once the framework and model development is agreed to, the contractor will work with staff to reach an understanding of what needs to be done to incorporate staff projections of annual energy demands in the residential, commercial, transportation, and industrial sectors along with the portion of the model developed by the contractor. The contractor will then further adapt the Adapted-PATHWAYS model or develop a new model.

## TASK 2.1: Model Capability to Assess Energy Consequences of Demand Scenarios and Sensitivities

Staff anticipates developing various types of scenarios with some additional sensitivities to reflect the implications of emerging policy innovations. Some elements of these scenarios will be developed using staff-developed projection tools and some must be addressed in the portions of the model developed by the contractor. Staff will complete the initial annual energy projections for the residential, commercial, transportation, and industrial sectors. Staff will then hand the projections to the consultant to generate a complete Reference Scenario covering all sectors and fuels.

1. The various types of Scenarios are:
* Reference Scenario – Planning forecast extended out to 2050.
* Policy/Compliance Scenario – Reference Demand scenario adjusted by program levers, such as: Title 24 ratchets, Title 20, Utility Retrofit programs, Transportation standards. This scenario and multiple sensitivities assessing specific programmatic innovations will illustrate the impact of actual policies that are not fully included in the Reference scenario.
* Enhanced Programmatic Scenario (Additional Policies, Not Goal Constrained). This scenario and multiple sensitivities add additional standards, programs, policies, and assumptions beyond those already included in the Policy/Compliance Scenario that are not yet approved.
* Scenarios including additional measures proposed by the California Air Resources Board (CARB) in their final 2022 Scoping Plan and by the California Public Utilities Commission (CPUC) in their 2023 Integrated Resources Plan.
1. AEAB Staff will work with the contractor to define the parameters of all the Scenarios to be implemented in the Demand Scenarios Model. The contractor will then use the model to evaluate the energy and GHG outcomes of all these Scenarios statewide and by electric planning area (PG&E, SCE, SDG&E, LADWP, BANC and Others).
2. The contractor will then review these results with AEAB staff.

## TASK 2.2: Refine Translation of Annual Electric Energy Projections into Hourly 8760 Load Projections by Planning Area

Since the core unit of geography of the Task 2.1 model development is at the level of electric planning area, the mechanics of developing hourly 8760 projections from annual electric energy projections can be improved compared to the initial 2021/22 demand scenarios tool. Contractor will work with CEC staff to design improved mechanics for the hourly projections, including, but not limited to, time-of-use rates and schedules. Once the WAM is satisfied with a proposed approach, the contractor will modify the model to implement the model changes. Once preliminary results are obtained, results will be compared to previous projections for consistency and further refinements may be needed. Changes to load profiles at the planning area/sector/sub-sector level for the final projections will be addressed in Task 3.3.

## TASK 2.3: Refine/Develop GHG Emission Factors

Regulatory requirements and various programs can be expected to modify the GHG emissions per unit of fuel combusted in each sector. For example, the essence of SB100 is to reduce the GHG emissions of electric generation in California by increasing the share of generation produced by renewables and other non-carbon emission generating technologies not qualifying for Renewable Portfolio Stand credits. Regulatory requirements for fuels may require fuel-specific GHG emission factors to also change through time. The Contractor will develop a series of annual GHG emission factors for each sector/fuel type combination reflecting these impacts by drawing upon existing studies. The contractor will also develop non-energy GHG emissions projections for the various scenarios and sensitivities.

The Contractor will develop a preliminary Reference scenario projection for fuel demand by sector/fuel type/electric planning area and associated GHG emissions at the same level of granularity for review by EAD staff. Significant departures of the new preliminary reference scenario projections from the previous reference scenario results of the initial 2021/22 demand scenarios project results will be reviewed and may lead to model and/or input assumption revisions.

## TASK 2.4: Energy Demand Impacts Of carbon, capture and sequestration & Direct Air Capture Technologies

The Contractor will develop new capabilities to endogenously project energy demand consequences of carbon, capture and sequestration and direct air capture technologies, as well as GHG impacts and costs for selected sectors such as petroleum refining and industrial sector for all the 13 scenarios in the Model. The costs could include initial capital costs, operating and maintenance costs. In the CARB Scoping Plan Scenario the penetration rates of these technologies will match those included by CARB in the final 2022 Scoping Plan.

**Task 2 Deliverables:**

1. Framework alignment between AEAB and contractor on the various scenario themes, data input assumptions and modifications which help the model development so that it can accept AEAB’s annual energy projections for residential, commercial, transportation and industrial sectors.
2. Further adapt the Adapted-PATHWAYS model provided by the CEC or develop a new model that satisfies the framework and model development requirements.
3. Working model with results (energy demand, GHG impacts, CCS) from preliminary projections for CEC Reference Scenario.
4. Working documentation explaining the model and its preliminary results.

**Task 3: ESTABLISH SCENARIOS, DEVELOP & DOCUMENT PROJECTIONS**

Expected Total Hours: 1000

Expected General Classifications: Analyst, Scientist, Engineer, Project Manager

The scope and schedule for this task must conform to AEAB staff plans to host a Demand Scenarios workshop in the 2023 IEPR proceeding by the end of 2023 outlining the nature of the project, goals for use of the demand scenario projections in the SB 100 proceeding with the contractor’s project support for quantification of scenario results.

## Task 3.1 Establish Scenarios and Sensitivities

The contractor will work with CEC staff to translate the framework and descriptions developed in Task 2 into detailed specifications for various scenarios and sensitivities. An initial set of scenarios/sensitivities listed below provides a sense of the scope and nature of the scenarios/sensitivities to be assessed. In compliance with general state goals to electrify most elements of energy usage, these scenarios all emphasize high electrification (HE), but sensitivity cases will explore the added consequences of additional measures to reduce traditional fuel consumption or augment electricity consumption in specific applications where electricity technologies are infeasible or too inefficient. In addition, Distributed Energy Resources (DER) or Demand Response (DR) programs/technologies may modify energy consumption or hourly system electric load shapes. These scenario/sensitivity cases include:

* High Electrification (HE)
* HE augmented by Biofuels
* HE augmented by Hydrogen
* HE augmented by Distributed Energy Resources (DER)
* HE augmented by Electric Demand/Load Flexibility Measures.
* 2022 CARB Scoping Plan Scenario
* 2023 CPUC Integrated Resource Plan Scenario

CEC Staff currently contemplate a total of 13 developed scenarios/sensitivities with annual energy projections from 2023 through 2050. Staff expects to hold a workshop on the Demand Scenarios Framework and results. The lead contractor should attend and be prepared to describe the development of the model, inputs and assumptions at that workshop.

**Task 3.1 Deliverables:**

1. Demand Scenarios model covering the entire statewide footprint but developed at the level of CEC staff planning areas, that can develop projections that are sensitive to program and policy inputs reflecting the range of scenarios listed in deliverable c).
2. Model results in Excel spreadsheet format out to 2050 for 13 statewide scenarios by electric planning areas (PG&E, SCE, SDG&E, LADWP, BANC & Others)
3. Final input datasets and a final working model. .
4. **Scenarios & Sensitivities**

|  |  |  |
| --- | --- | --- |
| S No. | Demand Scenarios | Demand Scenario/Sensitivity |
| 1 | Reference | Reference Scenario  |
| 2 | Policy/Compliance | High Electrification (HE) |
| 3 | Policy/Compliance (Sensitivity) | HE augmented by Biofuels  |
| 4 | HE augmented by Hydrogen |
| 5 | HE augmented by DER |
| 6 | HE augmented by Demand Response/Load Flexibility |
| 7 | Enhanced Programmatic Scenario | High Electrification (HE) |
| 8 | Enhanced Programmatic (Sensitivity) | HE augmented by Biofuels  |
| 9 | HE augmented by Hydrogen |
| 10 | HE augmented by DER |
| 11 | HE augmented by Demand Response/Load Flexibility |
| 12 | 2022 CARB Scoping Plan Scenario | TBD |
| 13 | 2023 CPUC Integrated Resource Plan Scenario | TBD |

## Task 3.2 Develop Demand Scenario Projections

Once the specifications of the Policy/Compliance and Enhanced Programmatic Scenarios have been finalized in Task 2 both staff and contractor will develop their respective projections to collectively reflect each of these two scenarios and their sensitivities as outlining in Task 2. Staff will then deliver the final energy demand projections for the residential, commercial, transportation, and industrial sectors for each of the scenarios in Task 2. The contractor will then incorporate these energy demand components in the model to generate 2022 – 2050 projection results for each of the Reference Scenario, Policy/Compliance Scenario and Enhanced Programmatic Scenario with the various scenario sensitivities. The contractor will then review results with key AEAB staff. The Contractor shall make revisions as directed by AEAB staff as a result of the review.

The contractor shall also identify GHG emission consequences from various fuel types (Energy emissions) and Non-Energy emissions and develop a list of methods for estimating the Total GHG emissions by economic sectors. The model will be capable of reporting GHG emission projections in two alternative reporting schema - CEC economic sectors and CARB scoping plan sectors - for all scenarios. For Non-Energy emission sources, the model will rely upon CARB 2022 Scoping Plan projections.

Staff and the contractor will present at a workshop a description of their methodology and results for the various types of scenarios and their sensitivities.

The contractor will prepare a 20-30 page draft and final white paper describing the process they used to modify input assumptions and calculations to run the Demand Scenarios model to accept AEAB’s projections, summarizing the model input assumptions and energy consumption and greenhouse gas emissions results for the various types of scenarios evaluated. The white paper will incorporate one round of staff comments.

**Task 3.2 Deliverables:**

1. Energy Demand projection results in Excel format including all scenario projections for 2022-2050 for each scenario, sector, fuel type, planning area combinations.
2. Draft/Final white paper on the inputs/assumptions/outputs used to develop the Demand Scenarios that staff can review.
3. Identify and incorporate GHG emission consequences from combustion GHG sources in the model.
4. Identify and incorporate GHG emission consequences from non-combustion GHG sources in the model.

**Task 3.3: DEVELOP AND EVALUATE LOAD PROFILES BY SUB-SECTOR**

In support of staff’s effort to develop long term demand scenarios, the contractor will collaborate with staff to review and develop selected load profiles by sector/subsector/end-use for use in translating annual electric energy into scenario 8760 hourly projections. AEAB staff use hourly load profiles in various demand forecasting tools and load modifier projection tools to generate hourly load projections. Both the contractor and AEAB staff will compare each other’s existing load profiles and the assumptions behind these load profiles and subsequently develop a consensus about what load profile assumptions to use to translate annual electric energy demand into hourly loads by year/sector/scenario/sensitivity case out to 2050.

Staff will review the contractor’s recommendation and determine which portions to utilize in this task.

Following the determination by staff, the contractor shall provide any non-CEC 8760 hourly profiles by sector/subsector to the AEAB staff in a format compatible with the load modifier and sector specifications.

**Task 3.3 Deliverables:**

1. PowerPoint slide deck summarizing the contractor’s comparison of their load profiles versus CEC’s load profiles by sector/subsector/end-use. This summary will provide relative strengths and weaknesses of the respective load profiles.
2. Memo comparing the contractor’s load profiles with AEAB’s load profiles documenting the differences in methodology, and the consensus for which load shapes to use in the Demand Scenarios project.
3. Excel workbook conveying recommended load profiles for use in CEC hourly projection tools.

**Task 3.4: DEVELOP HOURLY LOAD PROJECTIONS FOR THE ESTABLISHED SCENARIOS**

To extend the results of Task 3 annual electric energy projections for each scenario into hourly load projections useful for production simulation models, the contractor shall (1) review the basic approach implemented in the initial 2021/22 demand scenarios project, and (2) propose feasible options that can be completed by the end of calendar 2023. Following a selection from these options by the Contract Manager the contractor shall develop a method of projecting 8760 hourly loads from 2022 to 2050 given that there is a mix of electric energy hourly demand sources for each scenario (some generated by the contractor, and some imported from CEC forecasting and load modifier tools). Once the method is implemented and tested, the contractor will generate 8760 hourly results by sector/subsector by planning area for each of the scenario types (Reference, Policy/Compliance and Enhanced Programmatic) and for each sensitivity case with relevant electricity load pattern implications.

**Task 3.4 Deliverables:**

1. Memo identifying feasible methods for generating 8760 hourly projections by planning area and scenario.
2. 8760 load results by planning area for Reference, Policy-Compliance, and Enhanced Programmatic scenarios, using the load shapes based on Task 4
3. Model used to make the projections in deliverable b.
4. Spreadsheets/draft write up on the inputs/assumptions/outputs used to develop the Demand Scenarios that Staff can review.
5. Final write up and associated output spreadsheets detailing the work and results.

**Task 3.5: DEVELOP MODEL TRAINING FOR STAFF**

The contractor will provide training sessions along with preparation assignments to prepare staff to run the Demand Scenarios Model. The training will include a detailed walkthrough of model mechanics and the translation method of the annual loads in the model to hourly loads, with emphasis on hourly shapes.

**Deliverables:**

1. Training on the initial model mechanics and process of scenario development after each scenario is being developed.
2. Training on translating annual electric energy demand in the model into hourly loads.
3. Six two-hour Demand Scenarios Model training Sessions (and preparation assignments)

**TASK 4: DEVELOPMENT OF COST INPUTS AND PROJECTIONS**

Expected Total Hours: 300

Expected General Classifications: Analyst, Scientist, Engineer, Project Manager

The contractor will acquire from existing sources or develop new estimates of the costs to end-users of the technologies, along with program delivery costs, embodied in the projections for each scenario. Since the Adapted-PATHWAYS model or its replacement consists of some inputs from CEC staff modeling tools and some come from the original PATHWAYS itself, this task has two distinct sub-tasks that must be coordinated to the extent resources are available. The general objective of this cost assessment is to understand the relative net costs of alternative demand-side scenario elements with supply-side options as part of the SB100 proceeding.

**Task 4.1 COORDINATE INPUTS FROM CEC MODELS**

The Contractor shall work with the WA manager and CEC technical staff covering the residential, commercial, industrial, and transportation sectors to determine cost data to use in the Adapted-PATHWAYS model or its replacement. The cost data shall be consistent with the energy projections from the models developed in Tasks 2 and 3. When available in the timeline of this project, the contractor shall propose explicit formats to import these cost projections into the overall Adapted-PATHWAYS projection model.

**Task 4.2 DEVELOP COST PROJECTION CAPABILITIES FOR NON – CEC SECTORS**

To the extent policy-induced energy projections shift energy forms or energy consumption levels in sectors not addressed in CEC staff projections, the contractor will develop aggregate cost projections.

**Task 4 Deliverables:**

1. Develop format for importing AEAB sectoral cost projections into the demand scenario model.
2. Document methods and assumptions the contractor used to prepare aggregate sectoral cost estimates for Task 4.2.
3. Draft/Final white paper on the inputs/assumptions/outputs used to develop the cost projections that staff can review and provide feedback.

**Task 5: DEVELOP MODEL FOR AVIATION SUB- SECTOR**

Expected Total Hours: [~~120~~] **200**

Expected General Classifications: Analyst, Scientist, Engineer, Project Manager

In support of the Transportation Energy Demand Forecast (TEDF) and its incorporation into the IEPR, Demand Scenarios Project, and SB 100 proceedings, the contractor will develop improvements to the TEDF passenger/freight aviation fuel demand model. The leading product will be a literature review of various aviation fuel technologies, including but not limited sustainable aviation fuel (SAF) as a drop-in replacement for jet fuel, other potential drop-in combustion fuels with low carbon impacts, battery-electric aviation technologies, hydrogen fuel cell aviation technologies, and hydrogen combustion technologies. After a review and assessment of the technology introduction schedule for each of the technologies, the contractor will develop and propose new additions to the aviation fuel demand model that incorporate each of the technologies where feasible or appropriate. The Aviation fuel demand model will translate external inputs of Aviation travel demand into projected demand for individual fuels. The model will also incorporate any existing or proposed aviation fuel regulations or goals and be capable of being easily responsive to regulatory, programmatic, or technological changes that must be addressed in future IEPR cycles.

**Deliverables:**

1. Literature review of sustainable or low-carbon aviation technologies, including zero-emission fuels.
2. An improved fuel demand model integrating technologies, regulations, and flexibility to incorporate additional state goals.

**SCHEDULE OF DELIVERABLES AND DUE DATES**

Note: Actual deliverables will be specified in each Work Authorization.

|  |  |  |
| --- | --- | --- |
| **Task Number** | **Deliverable** | **Due Date** |
| **1** | **Agreement Management** |  |
| 1.1 | Kickoff Meeting, including meeting notes and next steps summary | Monthly |
| 1.2 | Prepare Invoices | Monthly |
| 1.3 | Manage Subcontractors | Monthly  |
| 1.4 | Monthly Progress Reports | Monthly |
| 1.5 | Work Authorizations | Monthly |
| **Task Number** | **Deliverable** | **Due Date** |
| **2** | **Adapt/Develop Demand Scenarios Model & Prepare Reference Scenario Projections** | **9/29/23** |
| 2.1 | Model Capability to Assess Energy Consequences of Demand Scenarios and Sensitivities | Ongoing |
| 2.2 | Refine Translation of Annual Electric Energy Projections into Hourly 8760 Load Projections by Planning Area | Ongoing |
| 2.3 | Refine/Develop GHG Emission Factors | Ongoing |
| 2.4 | Energy Demand Impacts Of Carbon, Capture & Sequestration & Direct Air Capture Technologies | Ongoing |
| **3** | **Establish Scenarios, Develop and Document Projections** | **11/15/23** |
| 3.1 | Establish Scenarios & Sensitivities | Ongoing |
| 3.2 | Develop Demand Scenario Projections | Ongoing |
| 3.3 | Develop and evaluate load profiles by sub-sector | Ongoing |
| 3.4 | Develop Hourly load projections for the established Scenarios | Ongoing |
| 3.5 | Develop Model Training for Staff | Ongoing |
| **4** | **Develop Cost Inputs and Projections** | **01/15/24** |
| 4.1 | Coordinate inputs from CEC Models | Ongoing |
| 4.2 | Develop cost projection capabilities for Non-CEC Sectors | Ongoing |
| **5** | **Develop Model for Aviation Sub-Sector**  | **09/01/23** |

# 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 using a standard 11‑point font, singled-spaced and a blank line between paragraphs. Pages must be numbered and sections titled.

## Method for Delivery

The method of delivery for this solicitation is the Energy Commission Grant Solicitation System, available at: [https://gss.energy.ca.gov/](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fgss.energy.ca.gov%2F&data=04%7C01%7C%7C6db4917e18aa46a4fc0808d8d42cbd67%7Cac3a124413f44ef68d1bbaa27148194e%7C0%7C0%7C637492635908664785%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=avUY8DTO%2Fg6shuUaQADf6Qcqw3G%2BwKwDDdd5WQWxbYk%3D&reserved=0). This online tool allows applicants to submit their electronic documents to the CEC prior to the date and time specified in this solicitation. Electronic files must be in Microsoft Word and Excel Office Suite formats unless originally provided in the solicitation in another format. Attachments requiring signatures may be scanned and submitted in PDF format. Completed Budget Forms, Attachment 7, must be in Excel format. **The system will not allow applications to be submitted after the application due date and time.**

First time users must register as a new user to access the system. Applicants will receive a confirmation email after all required documents have been successfully uploaded. A tutorial of the system is available on the [Energy Commission website](https://www.energy.ca.gov/funding-opportunities/funding-resources) under General Funding Resources. You may contact the Commission Agreement Officer identified in the Contact Information section of this solicitation for more assistance.

Due to COVID-19, hard copies will not be accepted for this solicitation.

## 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

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

### 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 (Optional)

Budget Forms Attachment 7. See also G below.

1. **Approach to tasks in Scope of Work**
2. Describe the Bidder’s approach to providing services listed in the Scope of Work, highlighting any outstanding features, qualifications and experience.
3. Describes how tasks will be executed and coordinated with various participants and team members.
4. Identifies and discusses factors critical for success, in addition to risks, barriers, and limitations. Provides a plan to address them.
5. Describes how the knowledge gained and lessons learned will be communicated to the public and key decision-makers.
6. **Organizational Structure**
7. Describe the organizational structure of the Bidder, including providing an organizational chart of the entire contract team.
8. Provide a short description of each firm and key members on the team. Describe the relationship between the Contractor and Subcontractors on your team.
9. Identify the location of the Bidder’s and Subcontractor’s headquarters and satellite office(s) and proposed methods of minimizing costs to the State.
10. Describe Bidder’s professional awards relevant to the Scope of Work in this RFP-22-803
11. 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.
12. **Relevant Experience and Qualifications**
	* + 1. Document the project team’s qualifications as they apply to performing the tasks described in the Scope of Work. Describe recently completed work as it relates to this Scope of Work.
			2. Identify and list all Bidder staff and Subcontractors (all team members) who will be committed to the tasks and describe their roles.
			3. Provide a current resume for all team members listed, including job classification and description, relevant experience, education, academic degrees and professional licenses.
			4. Identify the percentage of time each team member will be available throughout the contract.
			5. Identify and explain the nature of any collaboration between the Bidder or Subcontractors with utilities, industries, or others that is relevant to this project, and what each collaborator will contribute.
13. **Labor Hours by Personnel and Task**

Provide the title or classification of each person and their level of effort (hours) for each task, including subcontractor hours.

1. **Client References**

Each bidder shall complete Client Reference Forms. Three client references are required for the Contractor and each subcontractor.

1. **Previous Work Products**

Each Bidder shall provide a reference to at least one example of a similar work or academic research product, for the services to be provided as described in the RFP. An internet accessible link to the work or academic research product must be provided. If Subcontractors will be providing technical support in a task area, each Subcontractor shall also provide a reference to one example of a work or academic product that demonstrates experience in potential work assignments described in this RFP. An internet accessible link to the work or academic research product must be provided.

1. **Budget Forms**

Category Budget Attachment 7

Direct Labor Attachment 7

Fringe Benefits Attachment 7

Travel Attachment 7

Equipment Attachment 7

Materials & Miscellaneous Attachment 7

Subcontracts Attachment 7

Indirect Overhead Attachment 7

Profit Attachment 7

The Bidder must submit information on **all** of the attached budget forms 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. Bidder must include all people anticipated who will provide service on the Agreement. The Energy Commission may consider adding a person that the Bidder did not include in its Proposal. However, because the additional person might affect the Bidder's score or take additional time that the Energy Commission does not have or does not want to spend, the Energy Commission reserves the right to do any of the following, along with any other existing rights:

* Assess how the new person might affect the Bidder’s score, including possibly rescoring the Proposal
* Refuse to add the new person
* Add the new person.

Bidders are cautioned that they should include all team members in their Proposal.  The Energy Commission does not want to be in the position of assessing additional persons after the Notice of Proposed Award.

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 labor rates 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.

# 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 Scoring Criteria.

|  |  |  |
| --- | --- | --- |
| **% 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. |

## Notice of Proposed Award

The Commission will post a Notice of Proposed Award (NOPA) on the Commission’s Web Site, and will email the NOPA to all parties that submitted a proposal.

**Evaluation Criteria**

Using this Scoring Scale, the Evaluation Committee will give a score for each evaluation criterion .

**Evaluation Criteria Maximum Points**

**1.** **Technical Approach**  **20**

The proposal provides the following in response to each of the criteria listed below:

1. Describes the technique, approach, and methods to be used in providing the services task by task, listed in the Scope of Work, highlighting any outstanding features, qualifications, and experience.
2. Describes how tasks will be executed and coordinated with various participants and team members.
3. Identifies and discusses factors critical for success, in addition to risks, barriers, and limitations. Provides a plan to address them.
4. Describes how the knowledge gained and lessons learned will be communicated to the public and key decision-makers.

**2.** **Team Qualifications, Capabilities, and Resources** **10**

1. Describe the organizational structure of the Bidder, including providing an organizational chart of the entire contract team.
2. Provide a short description of each firm and key team 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), resources available to the team, and proposed methods of minimizing costs to the State.
4. Describe Bidder’s professional awards relevant to the Scope of Work in this RFP.
5. Describe how the various tasks in the Scope of Work will be managed and coordinated, and how the project manager’s expertise will support the management of this work. Document the project team’s qualifications as they apply to performing the tasks described in the Scope of Work. Describe recently completed work as it relates to this Scope of Work and demonstrate how the team has successfully completed projects in the past.
6. Identify and list all Bidder staff and Subcontractors (all team members) who will be committed to the tasks and describe their roles.
7. Provide a current resume for all team members listed, including job classification, relevant experience, education, academic degrees, and professional licenses.
8. Each Bidder shall complete Client Reference Forms for current (within the past three years) references. Three client references are required for the Contractor and three for each Subcontractor. References will be checked and scored accordingly.
9. Identify and explain the nature of any collaboration between the Bidder or Subcontractors with utilities, industries, or others that is relevant to this project, and what each collaborator will contribute.

**3. Previous Work Products** **10**

1. Each Bidder shall provide a link to a final technical report of narrative summary sufficient to understand the relevance of the previous work to the proposed Scope of Work of this RFP.. An internet accessible link to the work or academic research product must be provided. If Subcontractors will be providing technical support in a task area, each Subcontractor shall also provide a comparable link that demonstrates experience in potential work assignments described in this RFP. An internet accessible link to the work or academic research product must be provided.
2. Where appropriate work or academic products should describe in detail and highlight the Bidder’s ability to support tasks identified in this RFP including equations, data analysis methods and strategies, data schema, and diagrams.

**Specific Team Qualifications: Demand Scenarios Modeling**  **30**

Degree to which the application:

1. Demonstrated breadth and depth of knowledge of and experience with demand forecasting methodologies and tools.
2. Demonstrated breadth and depth of experience in developing annual energy demand and projections for various customer sectors and all fuels for six electric planning areas (PG&E, SCE, SDG&E, LADWP, BANC & Others) for several types of scenarios.
3. Demonstrated breadth and depth of knowledge in developing methods to accurately calculate GHG emission consequences from combustion and non-combustion GHG sources.
4. Demonstrated breadth and depth of knowledge of electric hourly load profiles and their forecasting, including seasonal impacts.
5. Demonstrated ability and experience in developing models, inputs and assumptions that incorporate detailed results from other models/tools, e.g., CEC’s annual energy and hourly 8760 load projections for residential, commercial, transportation, and industrial sectors.
6. Demonstrated breadth and depth of knowledge of various aviation and aviation fuel technologies.
7. Experience in modeling sector/subsector measure costs, and complimentary program administrative costs, into a model to enable aggregate comparison across scenarios.
8. Experience with and working knowledge of Analytica or other modeling software languages.
9. Demonstrated experience in explaining the model and its results at public workshops.
10. Demonstrated breadth and depth of knowledge to support the CEC in better understanding the State’s decarbonization goals.
11. Demonstrated depth and quality of work examples.

**BUDGET AND COST EFFECTIVENESS**

**1. Total Expected Labor Cost** 25

2. See Formula Below

**3. Other Direct Costs Mark Up** 5

4. See Table Below

**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**

**Total Technical Score:**

[~~Disabled Veteran Business Enterprise Preference
(This preference applies for participation exceeding 3.01%, see Preferences/Incentives in Section V.)~~]

Small/Micro Business Preference

Non-Small Business Preference

Target Area Contract Preference Act

**TOTAL FINAL SCORE:**(See Section V for Preference Details)

**Cost Criteria**

Total Expected Labor Costs (25/30 Cost Points)

Step 1

Calculate each *Individual’s Loaded Hourly Rate* = DL + FB + Indirect + Profit (Separately for the Prime and each Subcontractor). This is documented on Attachment 7a in each workbook.

Step 2

The Bidder (Prime Contractor) will complete the Attachment 7b of the budget workbook. This form will calculate the Total Expected Labor Costs portion of the cost criteria.

Total Expected Labor Cost Points:

Lowest Proposal Total Expected Labor Cost = 100% of total possible points for this criteria

All other proposals get a lower percentage of the possible points based on how close their proposal Total Expected Labor Cost is to the lowest proposal Total Expected Labor Cost as follows:

Lowest Proposal Total Expected Labor Cost / Other Proposal Total Expected Labor Cost = Other Proposal % of Possible Points

Example:

Proposal A Total Expected Labor Cost: $85,347; Proposal B Total Expected Labor Cost: $90,242; Proposal C Total Expected Labor Cost: $87,249.

Proposal A: Lowest Proposal Total Expected Labor Cost = 100% possible points

Proposal B: $85,347/$90,242 = 94.57% possible points

Proposal C: $85,347/$87,249= 97.82% possible points

Points Allocation (25 possible points):

Proposal A: 100% possible points = 25 points

Proposal B: 94.57% possible points = 23.64 points

Proposal C: 97.82% possible points = 24.46 points

Other Direct Cost (ODC) Mark-Up (5/30 Cost Points)

In addition to the evaluation of the labor costs, this solicitation will also evaluate the Contractor’s proposed mark-up rates (Indirect and Profit) for Other Direct Costs (ODCs). **ODC categories include** travel, materials or miscellaneous, **Subcontractors**, and equipment. The mark-up rate for purposes of evaluation is the sum of all rates charged in addition to the actual cost of the ODC. For example, materials for the agreement include pipe fittings at $5 each. When invoiced, the Contractor invoices for the $5 with a receipt for the actual costs but also charges a profit mark-up of 10% so $0.50. In addition, the Contractor includes materials in their base costs for indirect overhead calculated at 20% so $1. The cost that the Energy Commission reimburses is $6.50. The mark-up must be in accordance with the Contractor’s standard accounting procedures for indirect costs and profit. Some entities may call this a procurement burden. Please note that although entities may include travel in their indirect cost calculations, they may not charge profit on travel as the state is only authorized to pay travel and per diem at the state rates approved for represented employees. Points for this criterion will be awarded based on the sum of all mark-ups identified in the budget for ODCs and as follows:

Mark-Up Percentage Rate Range Cost Points

0%-10% 5

10.01%-20% 4

20.01%-30% 3

30.01%-40% 2

40.01% - 50% 1

50.01% or more 0

# V. Business Participation Programs (Preferences/Incentives)

A Bidder may qualify for preferences/incentives as described below. Each Bidder passing Stage One screening will receive the applicable preference/incentive.

This section describes the following business participation programs:

* DVBE Participation Compliance Requirements
* DVBE Incentive
* Small Business/Microbusiness Preference
* Non-Small Business Preference
* Target Area Contract Act Preference

## Disabled Veteran Business Enterprise (DVBE)

**Compliance Requirements**

***[~~DVBE Participation Required~~]***

**No DVBE Participation Compliance Requirement: The Energy Commission has waived this RFP from DVBE participation. Bidders may include DVBEs as part of their contract team. However, they will not receive any incentive points as part of the scoring process.**

[~~This RFP is subject to a mandatory certified DVBE participation of at least three percent (3%).~~

***~~Bidder or Subcontractor Suspension~~***

~~The Energy Commission shall reject a Proposal and shall not enter into a Contract if a Bidder or Subcontractor used by Bidder is currently suspended for violating DVBE law.~~

***~~Two Methods to Meet DVBE Participation Requirement~~***

* ~~If Bidder is a DVBE, then Bidder has satisfied the participation requirements if it commits to performing at least 3% of the contract with the Bidder’s firm, or in combination with other DVBE(s).~~
* ~~If Bidder is not a DVBE, Bidder can satisfy the requirement by committing to use certified DVBE Subcontractors for at least 3% of the contract.~~

***~~Required Forms~~***

~~Bidders must complete Attachments 1, 3 and 4 to document DVBE participation. If Bidder does not include these forms, the Bid is considered non-responsive and shall be rejected.~~

* ~~Contractor Status Form (Attachment 1).~~

~~Under the paragraph entitled: “Disabled Veteran Business Enterprise Participation Acknowledgement”, make sure to check the “yes” “DVBE Participation” box.~~

* ~~DVBE Declarations Std. Form 843 (Attachment 3)~~
* ~~Bidder Declaration Form GSPD-05-105 (Attachment 4)~~

***~~DVBE Definition~~***

~~For DVBE certification purposes, per Military & Veterans Code section 999(b)(6), a "disabled veteran" is:~~

* ~~A veteran of the U.S. military, naval, or air service of the United States, including but not limited to, the Philippine Commonwealth Army, the Regular Scouts (“Old Scouts”), and the Special Philippine Scouts (“New Scouts”);~~
* ~~The veteran must have a service-connected disability of at least 10% or more; and~~
* ~~The veteran must be domiciled in California.~~

***~~DVBE Certification and Eligibility~~***

* ~~To be certified as a DVBE, your firm must meet the following requirements in Military & Veterans Code section 999(b)(7):~~

~~(i) It is a sole proprietorship at least 51 percent owned by one or more disabled veterans or, in the case of a publicly owned business, at least 51 percent of its stock is unconditionally owned by one or more disabled veterans; a subsidiary that is wholly owned by a parent corporation, but only if at least 51 percent of the voting stock of the parent corporation is unconditionally owned by one or more disabled veterans; or a joint venture in which at least 51 percent of the joint venture’s management, control, and earnings are held by one or more disabled veterans.~~

~~(ii) The management and control of the daily business operations are by one or more disabled veterans. The disabled veterans who exercise management and control are not required to be the same disabled veterans as the owners of the business.~~

~~(iii) It is a sole proprietorship, corporation, or partnership with its home office located in the United States, which is not a branch or subsidiary of a foreign corporation, foreign firm, or other foreign-based business.~~

* ~~DVBE limited liability companies must be wholly owned by one or more disabled veterans. Public Contract Code section 10115.9.~~
* ~~Each DVBE firm listed on the DVBE Declarations Std. form 843 (Attachment 3) and on the Bidder Declaration form GSPD-05-105 (Attachment 4) must be formally certified as a DVBE by the Office of Small Business and DVBE Services (OSDS). The DVBE program is not a self-certification program. Bidder must have submitted application to OSDS for DVBE certification by the Bid due date to be counted in meeting participation requirements.~~

***~~Printing / Copying Services Not Eligible~~***

~~DVBE Subcontractors cannot provide printing/copying services.  For more information, see section VI Administration, which states that printing services are not allowed in proposals.~~

***~~To Find Certified DVBEs~~***

~~Access the list of all certified DVBEs by using the Department of General Services, Procurement Division (DGS-PD), online certified firm database at~~ [~~The State of California Certifications Webpage~~](https://www.caleprocure.ca.gov/pages/PublicSearch/supplier-search.aspx)~~. Search by “Keywords” or “United Nations Standard Products and Services Codes” (UNSPSC) that apply to the elements of work you want to subcontract to a DVBE. Check for Subcontractor ads that may be placed on the California State Contracts Register (CSCR) for this solicitation prior to the closing date. You may access the CSCR at~~ [~~California State Contracts Register Webpage~~](https://www.caleprocure.ca.gov/pages/Events-BS3/event-search.aspx)~~. For questions regarding the online certified firm database and the CSCR, please call the OSDS at (916) 375-4940 or send an email to: OSDCHelp@dgs.ca.gov.~~

***~~Commercially Useful Function~~***

~~DVBEs must perform a commercially useful function relevant to this solicitation, in order to satisfy the DVBE program requirements. California Code of Regulations, Title 2, Section 1896.71 provides:~~

~~“(a) A DVBE contractor, subcontractor or supplier of goods and/or services that contributes to the fulfillment of the contract requirements, shall perform a Commercially Useful Function (CUF) for each contract.~~

~~(b) A DVBE contractor, subcontractor, or a supplier of goods and/or of services is deemed to perform a CUF if the business does all of the following:~~

~~(1) Is responsible for the execution of a distinct element of work of the contract (including the supplying of services and goods);~~

~~(2) Carries out its obligation by actually performing, managing, or supervising the work involved;~~

~~(3) Performs work that is normal for its business services and functions;~~

~~(4) Is responsible, with respect to products, inventories, materials, and supplies required for the contract, for negotiating price, determining quality and quantity, ordering, installing, if applicable, and making payment;~~

~~(5) Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.~~

~~(c) A contractor, subcontractor or supplier will not be considered to perform a commercially useful function if its role is limited to that of an extra participant in the transaction, contract or project through which funds are passed in order to obtain the appearance of DVBE participation.~~

~~(d) Contracting/procurement officials of the awarding department must:~~

~~(1) Evaluate if a DVBE awarded a contract meets the CUF requirement as defined in subdivision (b), and~~

~~(2) During the duration of the contract, monitor for CUF compliance (See State Contracting Manual Volume 1 Chapter 8 and Volumes 2 and 3, Chapter 3).~~

~~(e) If a CUF evaluation identifies potential program violations, awarding departments shall investigate and report findings to OSDS, referring to §§ 1896.88, 1896.91 and the State Contracting Manual.”~~

***~~Compliance with Law; Information Verified~~***

~~Bidder shall comply with all rules, regulations, ordinances, and statutes that apply to the DVBE program as defined in Military & Veterans Code sections 999 and 999.5(d). Information submitted by the Bidder to comply with this solicitation’s DVBE requirements will be verified. If evidence of an alleged violation is found during the verification process, the State shall initiate an investigation, in accordance with the requirements of Public Contract Code Section 10115, et seq., and Military & Veterans Code Section 999 et seq., and follow the investigatory procedures required by California Code of Regulations Title 2, Section 1896.90 et. seq. Contractors found to be in violation of certain provisions may be subject to loss of certification, penalties, sanctions, civil actions and/or contract termination.~~

***~~DVBE Report~~***

~~Upon completion of the contract for which a commitment to achieve DVBE participation was made, the Contractor that entered into a subcontract with a DVBE must certify in a report to the Energy Commission: 1) the total amount the prime Contractor received under the contract; 2) the name and address of the DVBE(s) that participated in the performance of the contract and the contract number; 3) the amount and percentage of work the Contractor committed to provide to one or more DVBEs under the requirements of the Contract and the amount each DVBE received from the Contractor.; 4) that all payments under the contract have been made to the DVBE(s) (Energy Commission may require proof that payment was made); and 5) the actual percentage of DVBE participation that was achieved. If the Energy Commission does not receive the report, the Commission shall provide notice to the Contractor and if still not received, shall withhold $10,000 (or full payment if less than $10,000) from Contractor’s final payment. (For more details about the $10,000 withholding, see specific Agreement language in the Sample Agreement Example, Exhibit D, paragraph 4.) A person or entity that knowingly provides false information shall be subject to a civil penalty for each violation. Military & Veterans Code Section 999.5(d).~~

***~~The Office of Small Business and DVBE Services (OSDS)~~***

~~OSDS offers program information and may be reached at:~~

~~Department of General Services~~

~~Office of Small Business and DVBE Services~~

~~707 3rd Street, 1st Floor, Room 400~~

~~West Sacramento, CA 95605~~

[~~DGS Website~~](https://www.dgs.ca.gov/PD/Resources/Page-Content/Procurement-Division-Resources-List-Folder/How-to-do-business-with-the-state-of-California)

~~Phone: (916) 375-4940~~

~~E-mail:~~ ~~OSDSHelp@dgs.ca.gov~~

***~~DVBE Law~~***

* ~~Public Contract Code Section 10115 et seq.~~
* ~~Military & Veterans Code Section 999 et. seq.~~
* ~~California Code of Regulations Title 2, Section 1896.60 et. seq.~~

##

## ~~DVBE Incentive~~

~~The information below explains how the incentive is applied and how much of an incentive will be given.~~

**~~How the Incentive is Applied:~~**

~~The DVBE incentive is applied during the evaluation process and only to responsive Proposals/Bids from responsible Bidders. The incentive will vary in conjunction with the percentage of DVBE participation.~~

~~The Incentive is applied by adding the incentive to the Proposal/Bid for Bidders that include more than the minimum required 3.00% DVBE participation. In other words, if a Bidder includes 3.01% DVBE participation or greater, it will receive the DVBE incentive. If you include 3% DVBE participation, you will not receive the incentive. You will only receive the incentive, if you include 3.01% or greater DVBE participation.~~

~~The DVBE Incentive Program may be used in conjunction with the Small Business preference which gives a 5% preference to small business Bidders or 5% to non-small business Bidders committed to subcontracting 25% of the overall Bid with small businesses.~~

**~~How Incentive Amount is Calculated:~~**

~~Solicitations based on~~ **~~High Point~~** ~~will calculate the incentive as described below: Incentive points are included in the sum of non-cost points. The percentage is based on the total possible available points not including preference points for small/micro business, non-small business or TACPA. Incentive points cannot be used to achieve any applicable minimum point requirements.~~

|  |  |
| --- | --- |
| ~~DVBE~~~~Participation Level~~ | ~~DVBE Incentive~~~~Points~~ |
| ~~3.01% - 3.99%~~ | ~~1~~ |
| ~~4.00% - 4.99%~~ | ~~2~~ |
| ~~5.00% - 5.99%~~ | ~~3~~ |
| ~~6.00% - 6.99%~~ | ~~4~~ |
| ~~7.00% or over~~ | ~~5~~ |

***~~Required Forms~~***~~:~~

* ~~Contractor Status Form (Attachment 1).~~
* ~~DVBE Declarations Std. Form 843 (Attachment 3)~~
* ~~Bidder Declaration Form GSPD-05-105 (Attachment 4)~~

### *~~DVBE Incentive Law~~*

* ~~Military & Veterans Code Section 999.5(a)~~
* ~~California Code of Regulations Title 2, Section 1896.99.100 et. seq.~~]

## Small Business / Microbusiness / Non-Small Business

### *Preference*

Bidders who qualify as a State of California certified small business will receive five percent (5%) preference points based on the highest responsible bidder's total score, if the highest scored proposal is submitted by a business other than a certified small business.  Bidders qualifying for this preference must submit a copy of their Small Business Certification and document their status in Attachment 1, Contractor Status Form.

***Required Forms***

* Submit a copy of your Small Business Certification
* Contractor Status Form (Attachment 1)
* Complete the “Small Business Preference Claim” section

Bidder Declaration Form GSPD-05-105 (Attachment 4)

### *Certification*

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.

***Non Profit Veteran Service Agency***

Bidders that qualify as a Non Profit Veteran Service Agency can be certified as a small business and are entitled to the same benefits as a small business.

***Definitions***

* *Small business* means a business certified by the Office of Small Business Disabled Veteran Services (OSDS) in which:

(1) It is independently owned and operated; and

(2) The principal office is located in California; and

(3) The officers of the business in the case of a corporation; officers and/or managers, or in the absence of officers and/or managers, all members in the case of a limited liability company; or the owner(s) in all other cases, are domiciled in California; and

(4) It is not dominant in its field of operation(s), and

(5) It is either:

(A) A business that, together with all affiliates, has 100 or fewer employees, and annual gross receipts of fourteen million dollars ($14,000,000) or less as averaged for the previous three tax years, as adjusted by the Department pursuant to Government Code § 14837(d)(3); or

(B) A manufacturer as defined herein that, together with all affiliates, has 100 or fewer employees.

* *Microbusiness* means a small business certified by OSDS, which meets all of the qualifying criteria as a small business, and is:

(1) A business that, together with all affiliates, has annual gross receipts of three million, five hundred thousand dollars ($3,500,000) or less as averaged for the previous three tax years, as adjusted by the Department pursuant to Government Code §14837(d)(3); or

(2) A manufacturer as defined herein that, together with all affiliates, has 25 or fewer employees.

* *Non Profit Veteran Service Agency* means an entity that:
1. Is a community-based organization,
2. Is a nonprofit corporation (under Section 501(c)(3) of the [Internal Revenue Code](http://www.irs.gov/charities/charitable/article/0%2C%2Cid%3D96099%2C00.html)), and
3. Provides housing, substance abuse, case management, and employment training services (as its principal purpose) for:
	* low income veterans,
	* disabled veterans, or
	* homeless veterans
	* and their families

***Commercially Useful Function***

A certified small business or microbusiness shall provide goods or services that contribute to the fulfillment of the contract requirements by performing a “commercially useful function” defined as follows:

(1) The Contractor or Subcontractor is responsible for the execution of a distinct element of the work of the contract; carrying out its obligation by actually performing, managing or supervising the work involved; and performing work that is normal for its business services and functions;

(2) The Contractor or Subcontractor is not further subcontracting a greater portion of the work than would be expected by normal industry practices;

(3) The Contractor or Subcontractor is responsible, with respect to materials and supplies provided on the subcontract, for negotiating price, determining quality and quantity, ordering the material, installing (when applicable), and paying for the material itself;

(4) A Contractor or Subcontractor will not be considered as performing a commercially useful function if its role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to achieve the appearance of small business participation.

***Late Payment of Invoices***

Certified small/microbusinesses are entitled to greater interest penalties paid by the state for late payment of invoices than for non-certified small business/microbusiness.

***Small Business / Microbusiness Law***

* Government Code section 14835 et. seq.
* California Code of Regulations, Title 2 Section 1896 et. seq.

### Non-Small Business

***Preference***

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 will receive five percent (5%) preference points based on the highest responsible bidder's total score, if the highest scored proposal is submitted by a business other than a certified small business. A non-small business that qualifies for this preference may not take an award away from a certified small business.

***Required Forms***

* Submit a copy of the Subcontractor’s Small Business Certification
* Contractor Status Form (Attachment 1)
* Complete the “Small Business/Non-Small Business Preference Claim” section

Bidder Declaration Form GSPD-05-105 (Attachment 4)

### *Certification*

A Subcontractor business must be formally certified by the Department of General Services, Office of Small Business and DVBE Services (OSDS), in order to receive the Non-Small Business Preference.

***Non-Small Business Law***

* Government Code section 14838 (b)
* California Code of Regulations, Title 2 Section 1896 et. seq.

## Target Area Contract Preference Act

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

The TACPA program was established to stimulate economic growth and employment opportunities in designated Areas throughout the state of California. (GC4530)

The Department of General Services (DGS), Procurement Division (PD), Dispute Resolution Unit (DRU) oversees the TACPA program and evaluates all TACPA applications.

This solicitation 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.

The State as part of its evaluation process reserves the right to verify, validate, and clarify all information contained in the bid. This may include, but is not limited to, information from bidders, Subcontractors and any other sources available at the time of the bid evaluation. Bidder refusal to agree to and/or comply with these terms, or failure to provide additional supporting information at the State's request may result in denial of preference requested.

Contracts awarded with applied preferences will be monitored throughout the life of the contract for compliance with statutory, regulatory, and contractual requirements. The State will take appropriate corrective action and apply sanctions as necessary to enforce preference programs.

Any questions regarding the TACPA preference should be directed to the Department of General Services, Procurement Division at (916) 375-4609.

TACPA Preference Request (STD 830):

[STD 830 Document](https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std830.pdf)

Bidder’s Summary of Contract Activities and Labor Hours:

[Bidder's Summary Document](https://www.documents.dgs.ca.gov/dgs/fmc/gs/pd/gspd0526.pdf)

# VI. 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**

Bidder- Respondent to this RFP

CAM- Commission Agreement Manager

DGS- Department of General Services

DVBE- Disabled Veteran Business Enterprises

Energy Commission-California Energy Commission

Proposal- Formal written response to this document from Bidder

RFP- Request for Proposal, this entire document

State- State of California

## 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)

## Iran Contracting Act of 2010

Prior to bidding on, submitting a proposal or executing a contract or renewal for a State of California contract for goods or services of $1,000,000 or more, a vendor must either:

a) certify it is **not** on the current list of persons engaged in investment activities in Iran created by the California Department of General Services (“DGS”) pursuant to Public Contract Code section 2203(b) and is not a financial institution extending twenty million dollars ($20,000,000) or more in credit to another person, for 45 days or more, if that other person will use the credit to provide goods or services in the energy sector in Iran and is identified on the current list of persons engaged in investment activities in Iran created by DGS; **(See Option #1 on Attachment 9)**

b) demonstrate it has been exempted from the certification requirement for that solicitation or contract pursuant to Public Contract Code section 2203(c) or (d). **(See Option #2 on Attachment 9)**

(The Iran Act above only applies to solicitations for $1 million or more.

## California Civil Rights Laws

Prior to bidding on, submitting a proposal or executing a contract or renewal for a State of California contract for goods or services of $100,000 or more, a bidder or proposer must certify that it is in compliance with the Unruh Civil Rights Act (Section 51 of the Civil Code) and the Fair Employment and Housing Act (Section 12960 of the Government Code). Additionally, if a vendor has an internal policy against a sovereign nation or peoples recognized by the United States government, the Contractor must certify that such policies are not used in violation of the Unruh Civil Rights Act (Section 51 of the Civil Code) or the Fair Employment and Housing Act (Section 12960 of the Government Code).

See Attachment 10.

**Executive Order N-6-22 – Russia Sanctions**

On March 4, 2022, Governor Gavin Newsom issued Executive Order N-6-22 (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. “Economic Sanctions” refers to sanctions imposed by the U.S. government in response to Russia’s actions in Ukraine, as well as any sanctions imposed under state law. By submitting a bid or proposal, Contractor represents that it is not a target of Economic Sanctions. Should the State determine Contractor is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for rejection of the Contractor’s bid/proposal any time prior to contract execution, or, if determined after contract execution, shall be grounds for termination by the State.

## 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 ([CEC Website](http://www.energy.ca.gov/)) and Department of General Services’ Web Site([DGS Website](https://www.caleprocure.ca.gov/pages/index.aspx)).

## 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.

## Grounds 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 (DVBE) participation requirements.
* Bidder is currently suspended for violating DVBE law or Proposal includes a subcontractor currently suspended for violating DVBE law. Military & Veterans Code Section 999.9(g)
* It is lacking a properly executed Certification Clauses.
* It is lacking a properly executed Darfur Contracting Act Form.
* It is lacking a properly executed Iran Contracting Act Form
* It is lacking a properly executed California Civil Rights Law Certification Form.
* It contains false or intentionally misleading statements or references which do not support an attribute or condition contended by the Bidder.
* The Proposal is intended to erroneously and fallaciously mislead 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.

**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](https://www.dgs.ca.gov/OLS) and the Commission Contracts Office.
* Within five **calendar** days after filing the protest, the protesting Bidder must file with the [DGS Legal Office](https://www.dgs.ca.gov/OLS) 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.