HOMES Pay for Performance Statewide Implementer – Request For Proposals (RFP)

Pre-Bid Conference (RFP-26-501)

November 10, 2026

Agenda

Time	Topic
9:00	**Part I: Introductions and Logistics**
9:10	**Part II: HOMES P4P Program Background:** Federal HOMES background, California's P4P design, program roles, project lifecycle, rebate values
9:45	**Part III: RFP Components and Process:** Agreement structure, Scope of Work, Terms & Conditions
10:15	Break
10:30	**Part IV: Bidding and Evaluation Process:** proposal requirements, evaluation, next steps
11:00	**Part V: Questions and Answers**
12:00	**Part V: Close and Adjourn**

Housekeeping (1 of 2)

This workshop is being recorded!

- The recording will be posted on the **P4P Solicitation Webpage**.
- Attendees will be **muted** during the presentation.
- Virtual participation via Q&A window or telephone during Q&A period.
- Written questions to Commission Agreement Officer:
  - Include in subject line: RFP-26-501
  - Name: Diana Grady
  - Email: diana.grady@energy.ca.gov

Q&A deadline: Monday, November 16, 2026, by 5:00 PM

Housekeeping (2 of 2)

Official Responses Are Issued in Writing

- Follow up with your question **in writing** so it is captured properly
- Verbal communication with a CEC employee is **not binding** on the State
- Only written responses and addenda issued through the official solicitation process are controlling
- Updates, written questions and answers, and addenda are posted on the **P4P Solicitation webpage**



Introductions and Conference Objectives

- **CEC presenters**
  - Michael Dioha, Program staff
  - Miriam Joffe-Block, Program staff
  - Brennan McCoy, Program staff

- **Objectives**
  - Provide an overview of the HOMES Pay for Performance Program
  - Present key components of the Implementer Scope of Work (SOW) and the RFP
  - Explain the submission and evaluation process
  - Provide information for potential Bidders
  - Answer questions
    - Verbal answers are informational; official responses are issued in writing

RFP Overview

Purpose: Select a single Statewide Implementer (SWI) for the HOMES Pay for Performance (P4P) Program

SWI Role: Assist with final program design and manage the program day-to-day

Team: Bidders may use subcontractors

Anticipated term: Aug 2027 – Sept 2031

- Optional one-year extension

Funding:

- **Up to $16,500,000** for Administrative Services
  - Compensation for the SWI's work
- **$90,750,347** in Rebate Payment Funds
  - Disbursed by the SWI to Eligible Rebate Recipients
  - SWI serves as CEC's fiscal agent

RFP Manual, Section I – Purpose of RFP

Key Activities and Dates

Activity	
RFP Release	10/27/26
Pre-Bid Conference	11/10/26
Deadline for Written Questions	11/16/26
Distribute Questions/Answers and Addenda (if any) to RFP	12/16/26
Deadline to Submit Proposals by 11:59 p.m. *	**1/22/27**
Clarification Interviews (if necessary)	2/19/27
Notice of Proposed Award	3/31/27
Commission Business Meeting	6/17/27
Contract Start Date	8/1/27
Contract Termination Date	9/30/31

* An addendum will be released if the dates change for the asterisked activities.

RFP Manual, Section I – Key Activities and Dates

Where to Find Information

- **CEC's IRA Program page**
  - CEC's HOMES Application
  - Fraud, Waste and Abuse Mitigation Plan
- **Solicitation page**
  - RFP Manual and all attachments
  - Reference materials
    - DOE Guidance documents
    - ECAMS instructions for P4P solicitation
- **Docket 23-DECARB-01**
  - Public comments

Part II
HOMES P4P Program Background

Federal HOMES background, California's P4P design, program roles, project lifecycle, rebate values

HOMES is one of 3 IRA "Home Energy" Programs, funded through DOE



CEC will split HOMES funding between two approaches to residential decarbonization:

1

$130 million in rebates

Equitable Building Decarbonization Direct Install Program

- Will follow DOE's **Modeled Savings** pathway
- Covers 100% of cost of decarbonization upgrades for low-income residents in under-resourced and disadvantaged communities

2

$91 million in rebates

A New Pay for Performance (P4P) Program

- Will follow DOE's **Measured Savings** pathway
- Provides a rebate based on actual measured savings
- Send market signals to drive contractors toward projects that **maximize peak load reduction**

CEC's Public Engagement Timeline

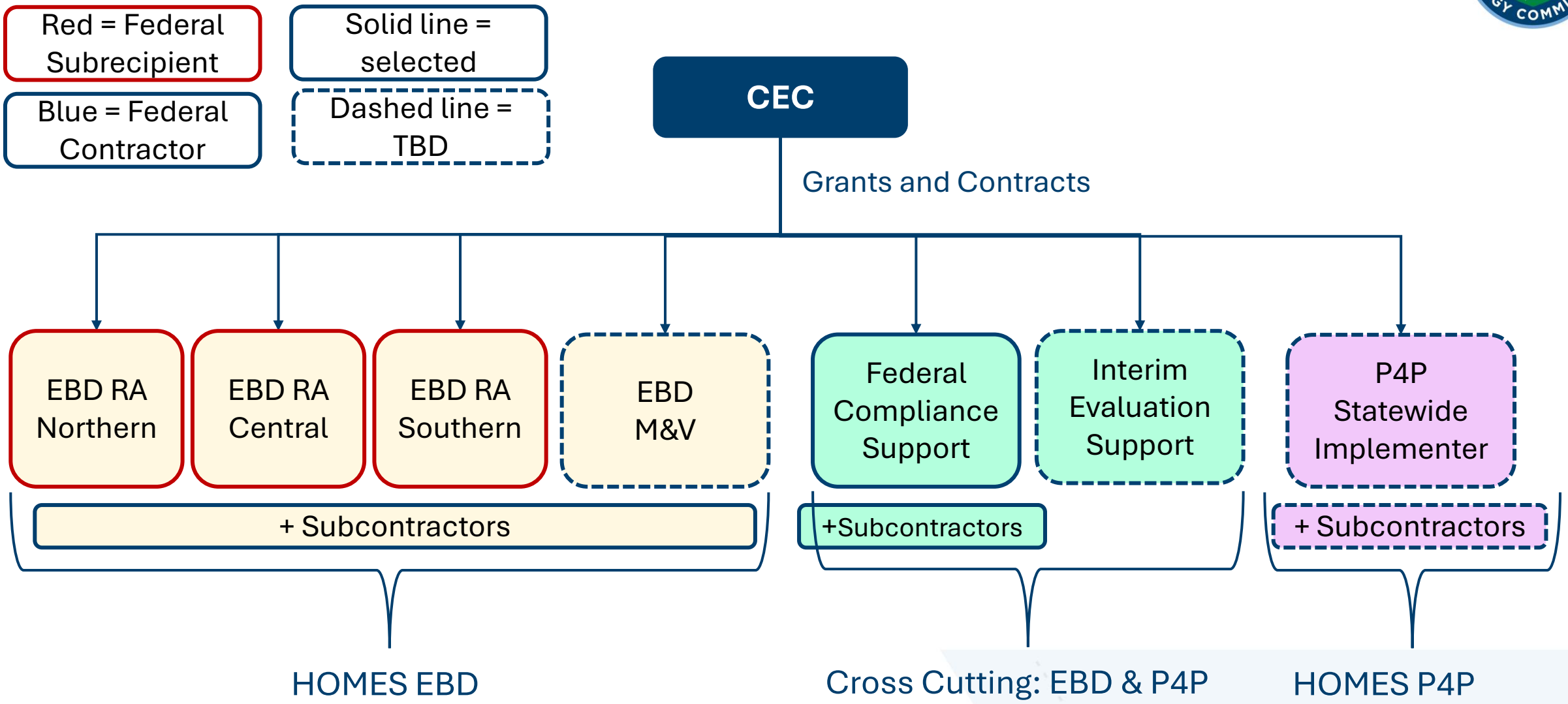
- **December 2023:** Issued Request for Information
- **March 2024:** Public workshop on a performance-based pathway
- **August 2025:** P4P solicitation concept workshop
- **November 2026:** Pre-Bid Conference for RFP

Federal process and status

- **January 2025**: DOE approved CEC's initial HOMES application
- **Sept 2025 – April 2026:** CEC submitted DOE-required *documents*
- **May 2026:** DOE issued updated HOMES guidance
- **August 2026 – October 2026:** CEC submitted updated DOE-required documents and revisions. DOE considers CEC's application and Fraud, Waste, and Abuse Mitigation (FWAM) Plan to be final.
- **November 4, 2026:** DOE approved launch of HOMES EBD!
- **After SWI selection:** Add final P4P details to application and obtain DOE approval to launch HOMES P4P

Since issuing new guidance at the end of May, 2026, DOE has also approved Florida, Oregon, Rhode Island and West Virginia to launch their rebate programs

HOMES Ecosystem in California



P4P Program Objectives

- Enable thousands of Californians to make energy upgrades and reduce energy consumption
- Further energy efficiency, grid resiliency, and load shifting in California
- Advance the State's goal of installing 6 million heat pumps
- Reward energy savings during peak demand times, and possibly in grid-constrained locations
- Use household-level utility meter data to identify high-impact projects, measure and reward performance, and drive improvements in screening and identification

RFP Manual, Section I – Program Objectives; Section II – Goals and Objectives

P4P Important Changes Since August 2025

Since the Solicitation Concept Workshop

- **Now structured as an RFP**
- **Scope of Work**
  - Expanded compliance, fraud prevention and documentation responsibilities
  - Added fiscal agent responsibilities
  - Expanded income-verification, and QA/QC responsibilities
- **Payment Structure**
  - Introduced volume-based unit deliverables
  - “Performance Incentives” now called “Milestone Payments”, and adjusted
- **Program Changes Reflected**
  - Included partial payments (upfront rebate payments), subject to DOE approval
  - Removed requirement for ENERGY STAR or geotagged-photos

Program Roles: CEC and the SWI

California Energy Commission

- Sets program rules
- Finalizes application to DOE (in consultation with SWI)
- Provides guidance, direction, task pre-approval, program oversight, course correction and deliverable review
- Requests and provides federal funds
- Submits quarterly performance reporting to DOE
- Oversees SWI project reporting to DOE
- Hands on relationship with the SWI
- Lead for any state/federal audit of program

Statewide Implementer

- Recruits, trains, supports, and oversees Aggregators and Energy Contractors
- Receives and processes rebate reservation applications and issues rebate payments
- Manages data platforms and daily operations
- Conducts project QA/QC and M&V
- Consumer outreach and protection
- Collects project data, stores and submits to DOE and CEC
- Complies with any state/federal audit

RFP Manual, Section I – Program Roles

Program Roles: Aggregators



Aggregators

- Bundle projects into portfolios; submit to the Program
- Pay contractors for the customer's portion of the expected rebate, financing the value during the 12 month M&V period
- Receive final payments based on actual energy savings
- Take on performance risk
- Help Energy Contractors identify high-potential homes
- Help Contractors estimate rebate value

Examples of entities that might serve as an Aggregators:

- Commercial aggregators participating in CPUC Market Access Programs
- Specialty Companies
- Larger Energy Contractors
- Community Choice Aggregators
- Labor / Trade Union Associations

RFP Manual, Section I – Program Roles

Program Roles: Energy Contractors and Participants

Energy Contractors



- Scope projects; share estimated energy and bill impacts with the consumer
- Install upgrades
- Provide a point-of-sale discount equal to a set portion of the estimated rebate value
- Provide project data and documentation
- Receive payment from Aggregators for customer's portion of rebate

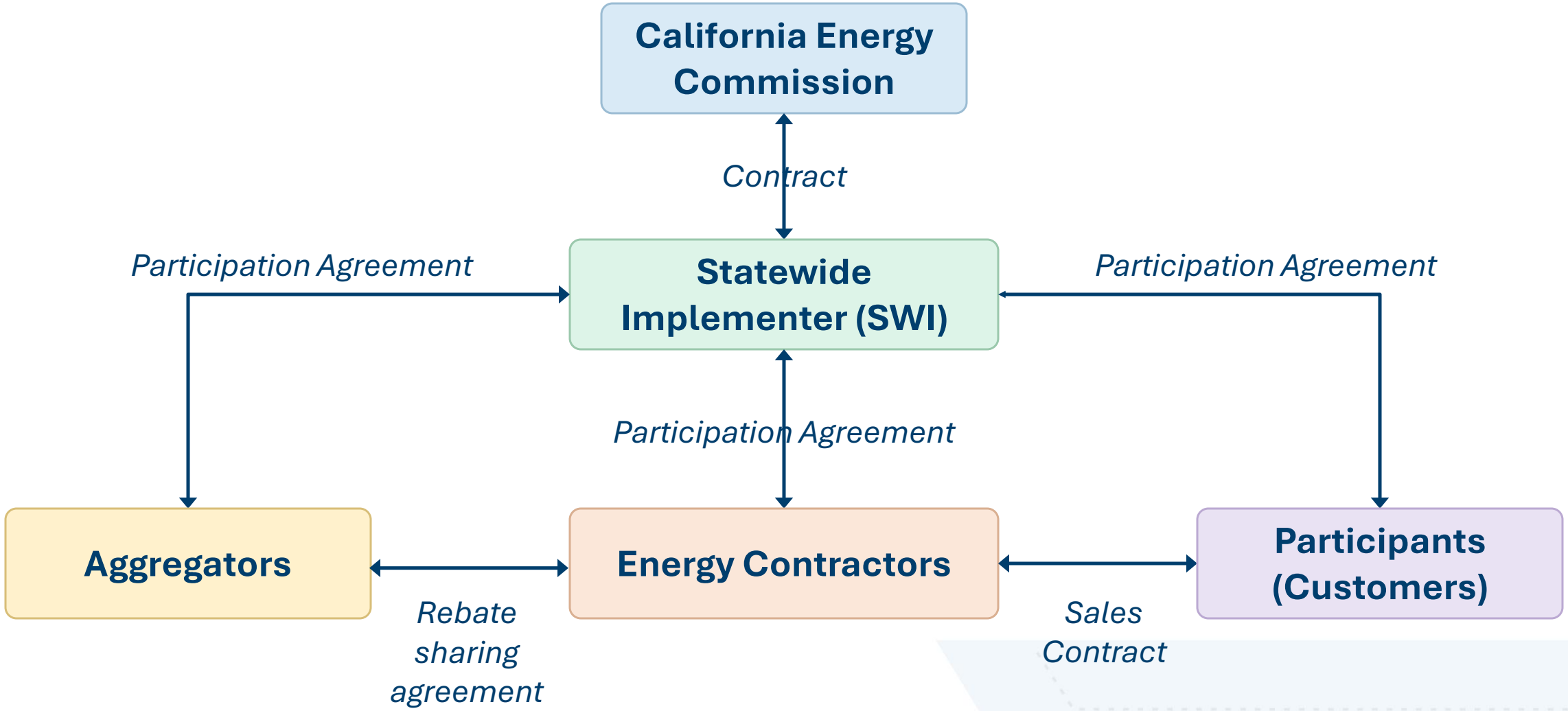
Participants (Homeowners)



- Choose and hire an Energy Contractor enrolled in the Program
- Select energy upgrades
- Authorize use of energy data for M&V
- Receive the estimated rebate benefit at the time of installation

RFP Manual, Section I – Program Roles

Relationships Between the Parties



Program Set-Up Steps



SWI will:

1. Support CEC in finalizing DOE application details, program rules, workflows, and other launch requirements.

2. Establish Aggregator and Energy Contractor requirements and conduct outreach.

3. Ready key operations to support launch.

4. Use CEC energy consumption data set to help Aggregators identify high-impact geographies.

Project Steps (simplified)

1



Energy Contractor or Aggregator scopes a project for homeowner, estimates energy savings and rebate value, submits rebate reservation request.

2



SWI reviews savings estimates, estimates rebate payment, confirms rebate reservation.

3



Energy Contractor completes installation, discounts estimated rebate value from homeowner's invoice.

SWI conducts QA/QC checks.

Aggregator pays Energy Contractor.

4



12 months measurement period.

SWI updates Aggregator on performance.

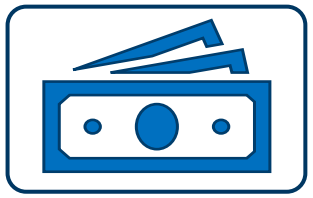
5



SWI conducts M&V, determines final savings & rebate payment. Aggregator assigns project to a portfolio. SWI confirms 15% threshold and pays Aggregator.

Partial Payments (upfront payments) not shown

Eligibility



Income

- All income levels
- Rebate value doubled for low income



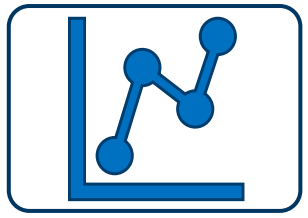
Building Type

- Single Family
- Multifamily allowed but expecting primarily single-family
- Manufactured and mobile homes ok, but may be challenged by master-metering



Projects/Measures

- Efficiency: envelope and electric appliance upgrades
- No freestanding AC, no gas appliances
- Solar, battery cannot count toward energy savings nor be part of project cost
- Final project rules to be determined with SWI



Data Sufficiency

- Desire to include customers who have lived in their home less than 12 months; customers installing solar, batteries or EV charging. However:
- SWI must be able to use open-source advanced M&V software to measure savings

Rebate Values: DOE Derived Incentive Rate

1. IRA Statute

Limits rebates to "a payment rate per kilowatt hour saved, or kilowatt hour-equivalent saved, equal to $2,000 for a 20 percent reduction of energy use for the average home in the state."

2. Average Home Energy Use

DOE used Energy Information Administration data to derive average home energy use for CA:

Total statewide energy use divided by total households in state

3. State-specific Incentive Payment Rate

DOE assumed if the average **California** home reduced its energy by 20% and received $2,000, then the payment rate for all energy saved would be **$.55/kWh and $16.17/therm**.

Rate for Low Income Households is **$1.10/kWh and $32.31/therm.**

Rebate Values: Time of Savings







IRA Statute allows states to value savings based on time, location or GHG reduction

Energy saved at peak hours is more valuable

DOE approved CEC's plan to assign relative weighting to different time periods

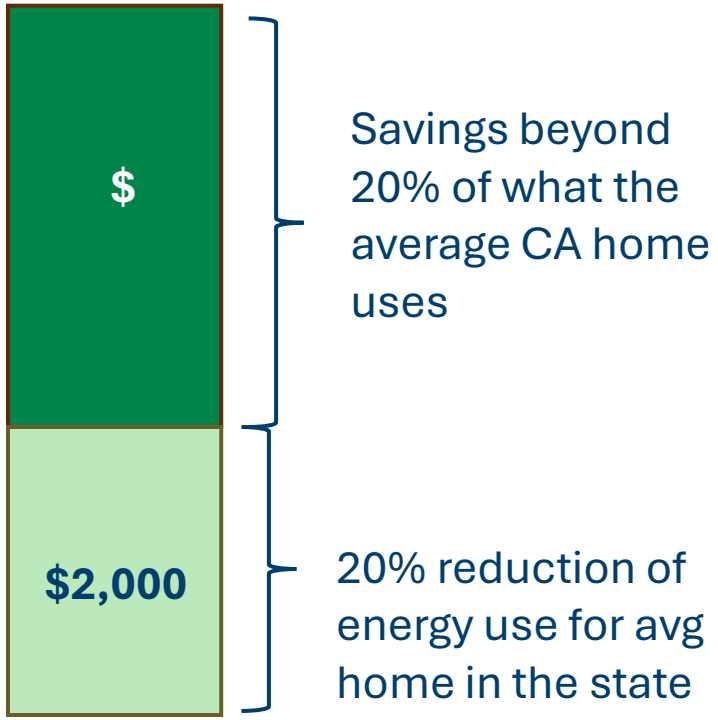
Take $.55 / $1.10 per kWh base rate and assign "relative weighting":

- Allows state to send price signal to reward load reduction at certain times. Examples:
  - Simple on and off peak hours
  - Peak and off-peak seasons and hours, include mid and high peaks
  - Align to CPUC Avoided Cost Calculator
- Average payment rate across 8760 hours per year must equal $.55 / $1.10 per kWh
- Final weighting to be set in consultation with Statewide Implementer

Rebate Values: How Much?

CEC is expecting rebates to be higher than the $2,000/$4,000 mentioned in statute because:

- DOE's rate was derived from a statistically average home – many homes use more energy and have potential to save more
- Many homes built before building code
- Heat pumps are highly efficient
- Modeling shows higher rebate values in hot climates, even without valuing time of savings

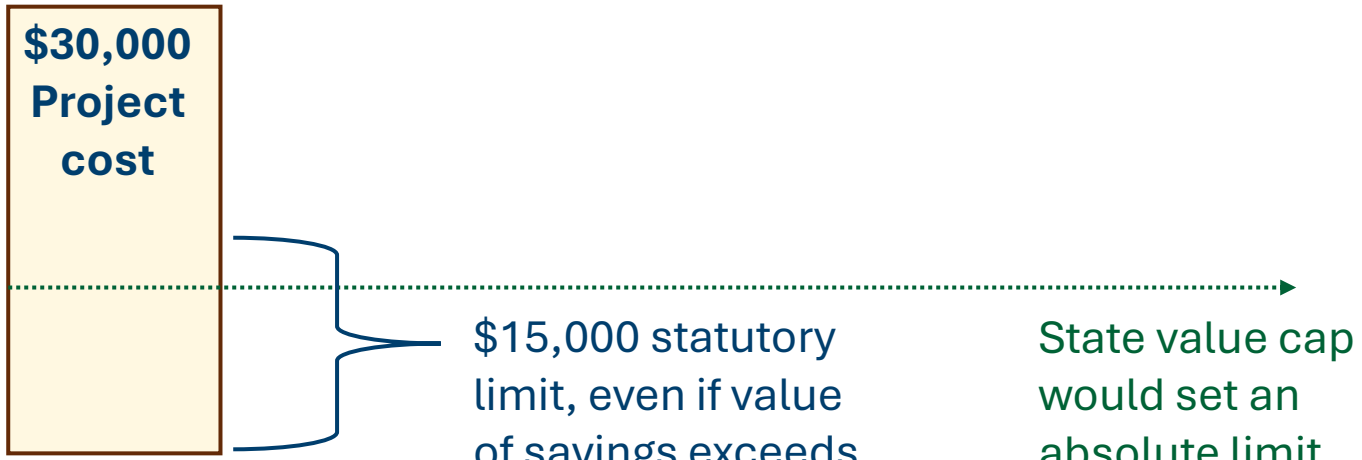


P4P rebates cannot be combined with HEEHRA rebates.
They can be layered with utility, REN, CCA or other local rebates.

Rebate Values: Caps

1) **Statutory cap:**
   - Limits rebates to 50% of project cost (80% for Low Income Households)

2) **State Value cap:**
   - CEC will set a state value cap to protect the Program from overpaying for high-cost, high-savings projects
   - State value cap **to be set in consultation with Statewide Implementer**



With all decisions about rebate values, goal is to make rebates high enough to motivate homeowners, Aggregators and Energy Contractors, while supporting as many projects as possible.

Rebate Values: Splits

For **customer** at time of invoice:

- Based on estimated savings

Final value paid to **aggregator**:

- Based on 12 months pre- and post- installation energy savings measured at meter
- If measured savings are greater than expected, payment to Aggregator is capped at 120% of estimated savings

Total Estimated Rebate Value

Homeowner's share: fixed percentage

Aggregator's share: fixed percentage

Aggregator can decide to pass on part of their share to Energy Contractor

Meter-Based Savings Parameters

- SWI must used **DOE-approved open-source advanced M&V software**-and CEC-approved methodology
- Both **electric and gas** savings incorporated
- 12-month M&V period
- Aggregators assign projects with completed M&V results to portfolios
  - Aggregator-specific and time-bound
- 15% savings required at portfolio level for payment

Utility Data Access

Before and After Customer Authorization

Prior to customer authorization

- CEC collected utility data
- SWI will identify high-impact geographies and potentially run data-sufficiency checks
    - Share only geographies and indicators with Aggregators: **no customer-level usage data to be shared.**

Post-authorization



- Customers **may** authorize data sharing with Aggregators or Energy Contractors to help with rebate value estimates
- Customers **must** authorize data sharing with the Program (SWI) to participate
- Consent provided through the Participation Agreement (12 months pre- and post-project)
- Used for data sufficiency checks, project and portfolio M&V, reporting, and program analysis

RFP Manual, Section I – Utility Data Access; Attachment 20

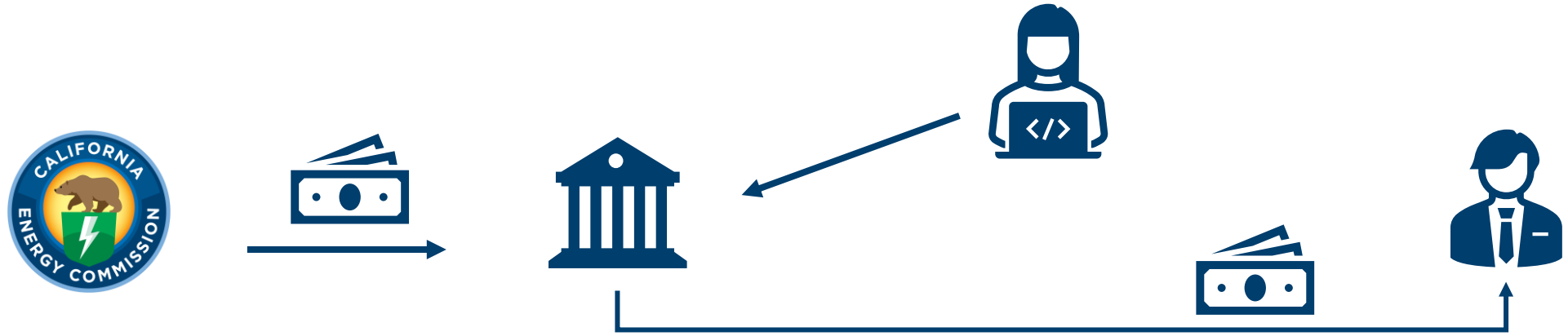
Utility Data Sharing Pathways

Section 1353 CEC collected data*	• Utility-reported data available to CEC, where timely and complete
Direct data-sharing agreements	• Between CEC and POUs or other utilities not covered by Section 1353
Customer-authorized access	• “Share My Data,” Green Button “Connect My Data” or third party platforms like UtilityAPI, Arcadia and Deck
Utility Bills	• When other pathways are unavailable or insufficient

RFP Manual, Section I – Utility Data Access

*See Attachment 20: Background Information About Utility Data Available through California Code Of Regulations, Title 20, Section 1353

Advanced Payments for Rebate Payment Funds



- SWI will submit forecasts and advance payment requests for needed Rebate Funds only
  - *All administrative expenses are paid on a reimbursement basis*
- CEC will advance Rebate Payment Funds to a CEC-established financial account
- As CEC's fiscal agent, SWI will access the account and disburse Rebate Payment Funds to Aggregators
  - SWI does not advance its own funds for rebates
  - SWI will perform reconciliations of Advanced Funds

RFP Manual, Section I – Fiscal Agent Role, Exhibit B Budget Details - #10

Partial Payments (Upfront Payments)

- DOE Program design envisions Aggregators providing financing for rebates during 12 month M&V period
- DOE updated guidance signaled support for “Partial Payments” (Upfront Payments)
- **CEC’s Proposed Partial Payments Plan:** – *Pending DOE review*
  - Objective: reduce the amount of outside financing Aggregators will need
  - SWI uses HOMES Rebate Funds to pay Aggregator up to 50% of expected rebate value, following installation and project QA/QC
  - After M&V period, SWI performs true-up to determine final portfolio rebate payment to Aggregator
  - Program has options to mitigate risk of payment for savings that don’t materialize
  - SWI would use Advanced Funds for the Partial Payment

Comparison with CPUC-Authorized Market Access Programs (MAPs)

Similarities

- Aggregator delivery model
- Meter-based savings
- Time of savings is valued. Possible alignment with Avoided Cost Calculator (ACC)
- Possible alignment with Population-Level NMEC methods

Differences

- 15% portfolio savings threshold
- No cost-effectiveness/TRC requirement
- Not subject to the NMEC rulebook (unless CEC chooses to align)-> No required engineering reviews
- SWI is a neutral determinator of savings; SWI compensation is **not** based on energy savings

P4P Rebates may be layered / stacked and integrated with MAP offerings

Program Details to be Refined with SWI

Rebate time weighting and state value caps

Operational workflows and data processes

Final project requirements and "project cost" criteria

Aggregator and Contractor eligibility requirements

QA/QC procedures

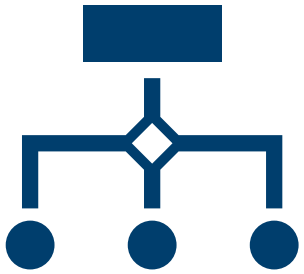
Layering and integration with other programs

Part III
RFP Key Components

Funding, Scope of Work, Key Terms

Single Implementer and Period of Performance

- Competitive solicitation: **one Contract** awarded to the responsive Bidder with the highest score after application of Preferences
- CEC expects bids to include organizational teams
- Prime Contractor remains responsible for the complete Scope of Work



Period of Performance

- Ends no later than September 30, 2031 (HOMES Statutory end date)
  - CEC's HOMES award currently runs through July 31, 2028
  - DOE intends to extend through statutory end date



Funding Components

- **Administrative Services:** Up to $16,500,000
- **Rebate Payment Funds:** $90,750,347 disbursed to Eligible Rebate Recipients

→ **Administrative Services Breakdown:**

1. Labor and cost reimbursement
2. Volume-Based Unit Deliverables
   - Activities repeated thousands of times
   - Set price benefits both parties
   - Pricing is fixed through Agreement term
   - Examples: Income verifications, post project certificates
3. Milestone Payments (up to $1,500,000)
   - Claimed upon CEC verification

RFP Manual, Section I – Available Funding

Milestone Payments

Up to $1,500,000 as incentives – paid only after CEC verifies the achievement

Achievement	Payment
Three Aggregators approved for participation in the Program	$100,000 (one-time)
Each project that has passed QA/QC and for which the M&V performance period has begun (up to 14,000 projects)	$50 per project
Energy savings realization rate first reaches or exceeds 80% (quarterly, all projects, at least 10 projects)	$100,000 (one-time)
Energy savings realization rate first reaches or exceeds 90%	$100,000 (one-time)
$85,000,000 in rebates paid out to Eligible Rebate Recipients	$500,000 (one-time)

RFP Manual, Section I – Administrative Services

Optional Amendments

- CEC may amend the Agreement for:
  - A **one-year time extension**
  - Up to an additional **$10,000,000** in Rebate Payment Funds (total up to $100,750,347)
  - Up to an additional **$5,000,000** in Administrative Services expenses (total not-to-exceed $21,500,000)
  - **Substantive Scope of Work changes** to align with updated DOE guidance



RFP Manual, Section I – Additional Funding; Period of Performance; Optional Amendments

Funding Conditions and Steps to Approval

Agreement Structure and Funding

- If federal funds become unavailable or reduced, CEC may cancel the agreement or offer an amendment reflecting a reduced amount of funds.
- **Prior to Contract Execution:**
  - CEC notifies DOE 30 days before contract execution
  - CA Department of Finance approval of the SWI as fiscal agent
  - CA Department of General Services approval of contract
- **Prior to SWI commencing work:**
  - SWI prepares a budget justification for DOE approval
  - DOE provides written approval for CEC to begin reimbursing SWI as a Contractor
- No reimbursement for work before DOE's initial approval, including budget justification

RFP Manual, Section I – Funding Conditions

Types of Tasks and Deliverables

Scope of Work

Known	As-needed	Potential	Ongoing
Predominately one-time tasks with a deliverable like a plan or procedure	Quantity or frequency to be determined by CAM with SWI input	Uncertain if will be needed. Depends on market conditions and final program design. SWI to provide input.	Recurring tasks like monitoring or implementation without specific linked deliverable

- Commission Agreement Manager (CAM) approval required to begin all tasks
- Exhibit A-1, Schedule of Deliverables is included in Attachment 8, Sample Agreement
  - Shows which tasks CEC expects SWI to launch into first, after contract execution

RFP Manual, Section II – Types of Tasks and Deliverables

Scope of Work: Ten Tasks

1. Agreement Management
2. Program Design
3. Aggregator and Energy Contractor Management and Support
4. Consumer Outreach and Protection
5. Data Applications, Management, Integration and Reporting
6. Low-Income Verifications
7. Process Rebate Applications and Payments
8. Quality Assurance and Quality Control
9. Data Analysis and M&V
10. Compliance and Compliance Reporting

All tasks must be completed in accordance with DOE's guidance for the HOMES program, as well as CEC's approved HOMES award and Fraud, Waste and Abuse Mitigation Plan

Tasks 1 and 2

Scope of Work

Task 1 – Agreement Management

- Kick-off meeting
- Program meetings and briefings
- Invoices
- Rebate Payment Funds management (fiscal agent)
- Budgeting and project workplans
- Progress reports
- Manage subcontractors
- Final report outline, report, and meeting

Task 2 – Program Design

- Design input
- Workflows
- Research and analysis
- DOE application and communication
- Program communication
- Continuous improvement



Tasks 3 and 4

Scope of Work

Task 3 – Aggregator and Energy Contractor Management and Support

- Qualifications and enrollment
- Outreach and education
- Discipline and removal
- Training and oversight
- Support



Task 4 – Consumer Outreach and Protection

- Household outreach
- Participant Agreement
- Household support
- Consumer feedback and resolution
- Project certificates *(unit deliverable)*
- Customer opt-in website *(potential)*



Tasks 5 and 6

Scope of Work

Task 5 – Data Applications, Management, Integration and Reporting

- Ability to receive applications for rebate reservations and requests for payment
- Additional application features; kitchen table tool for Energy Contractors *(potential)*
- Data management
- Program and project reporting to CEC
- Project reporting to DOE
- API integration with DOE systems (*potential*)
- Transfer of data at end of contract

Task 6 – Low-Income Verifications

- Income screening tool
- Low-income verification process
- Conduct low-income verifications (*unit deliverable)*



Tasks 7 and 8

Scope of Work

Task 7 – Process Rebate Applications and Payments

- Project address checks process
- Conduct address checks *(unit deliverable)*
- Rebate reservation and final payment review and approval processes
- Conduct reviews and process reservation applications *(unit deliverable)*
- Conduct reviews and process requests for rebate payments
- Pay DAC incentives
- Partial Payments review and payment process (potential)

Task 8 – Quality Assurance and Quality Control

- QA/QC standards and procedures
- Post-installation desktop reviews – all projects (unit deliverable)
- Post-installation virtual inspections *(unit deliverable)*
- Prevailing wage coordination



Tasks 9 and 10

Scope of Work

Task 9 – Data Analysis and M&V

- Identify high-impact projects
- Data sufficiency screening and checks *(potential)*
- Develop M&V processes
- Conduct project and portfolio M&V; share results with CEC
- Calculate rebate values
- Additional M&V process development *(potential)*

Task 10 – Compliance and Compliance Reporting

- Support CEC with compliance reporting and audits
- Documentation of processes and procedures
- Risk assessment
- Fraud prevention and corrective action



Volume-Based Unit Deliverables

Scope of Work

- Subtask 4.5 – Project Certificates
- Subtask 6.3 – Conduct Low-Income Verifications
- Subtask 7.2 – Conduct Project Address Checks
- Subtask 7.4 – Conduct Reviews and Process Applications for Rebate Reservations
- Subtask 8.2 – Post-Installation Desktop Reviews: All Projects
- Subtask 8.3 – Post-Installation Virtual Inspections

More details:

- Bidders propose a Cost per Unit; can not increase during Agreement
- Profit is not applied to Unit Deliverables
- CEC does not guarantee quantity. Depends on final rebate value caps and how well SWI drives program uptake.

Terms and Conditions (T&Cs)

Terms and Conditions

Attachment 8, Sample Standard Agreement

- **Budget T&Cs (Exhibit B)** – allowable costs, rate caps, invoicing procedures, retention, limitations on profit, advanced payment terms
- **State T&Cs (Exhibit C)**
- **Special T&Cs (Exhibit D)** – Confidential and Personal Information including requirements for Information Security Program Plan (ISPP) and signed nondisclosure agreements; GenAI training and use; public works and prevailing wage
- **Conflict of Interest (Exhibit E)** – Political Reform Act implications, Form 700 requirements, ethics training, restrictions on financial relationships with Aggregators
- **Federal T&Cs (Exhibit F)** – CFR provisions incorporated by reference, audits, flow down requirements, record retention, lobbying rules, foreign national participation, reporting and disclosure requirements

Read them all!

Special T&Cs: Public Works and Prevailing Wage

Terms and Conditions

- Projects may be public works under California Labor Code unless exempt
  - **DIR clarified** that HEEHRA single-family projects are **not** subject to prevailing wage requirements pursuant to the exception in Labor Code section 1720(c)(5)(C)
- CEC is the Awarding Body for Public Works compliance
  - Guidehouse is support Contractor for prevailing wage compliance
- SWI has prevailing wage responsibilities for **Multifamily properties**
  - SOW Task 8.4: Coordinate with CEC, Guidehouse, Aggregators and Energy Contractors to facilitate prevailing wage compliance; do not pay rebates until CEC or Guidehouse confirms prevailing wage requirements have been met
  - Special T&Cs, Section 30: ensure Energy Contractors comply with public works/prevailing wage reqs; certify to CEC on invoices that prevailing wages were paid to eligible workers, when applicable

15-Minute Break

Part IV
Bidding and Evaluation Process

Proposal Organization

Section 1: Administrative Response	Section 2: Technical and Cost Proposal
• All required administrative forms and certifications	• Experience, qualifications, approach to SOW, budget forms

- Prime Bidder is responsible for proposal submission
- Use the attachment numbers and formats provided in the RFP; do not alter required language, formulas, worksheets, or attachment numbering
- See RFP Manual for formatting requirements
- Attachment 16 is an optional Checklist; helpful to organize proposal

Attachments Overview (#1 - 11)

Blue: Administrative response **Yellow:** Technical and cost **Light green:** Reference only

#	Attachment	Status and use
1	Contractor Status Form	Required
2	Darfur Contracting Act Form	Required
3	DVBE Std. 843	Optional
4	Bidder Declaration form GSPD-05-105	Optional
5	Contractor Certification Clauses	Required
6	Client References and Past Projects Information	Required, no direct points
7	Budget Forms (Excel format)	Required, cost (30 points)
8	Sample Standard Agreement	No Response needed
9	Iran Contracting Act Form	Required
10	California Civil Rights Laws Certification	Required
11	Byrd Anti-Lobbying Amendment Certification	Required

RFP Manual, Attachments list; Section III

Attachments Overview (# 12 - 20)

Blue: Administrative response **Yellow:** Technical and cost **Light green:** Reference only

#	Attachment	Status and use
12	Technical Proposal Bidder Response Form (A–F)	Required, technical (70 points)
13	Samples of Messaging and/or Marketing Materials from previous programs	Required, scored with Criterion A
14	Resumes (up to 2 pages each)	Required, scored with Criterion E
15	Generative Artificial Intelligence (GenAI) Disclosure CEC-50	Required
16	Proposal Submittal Checklist	Optional, completeness review
17	Small Business Certification	Optional, small business preference
18	TACPA Preference Request STD 830 form	Optional, TACPA preference
19	TACPA Bidder's Summary DGS/PD 526 Form	Optional, TACPA preference
20	Section 1353 Utility Data	No Response needed

RFP Manual, Attachments list; Section III; Section V

Technical Proposal Components

Technical and Cost Proposal Details

Technical Proposal: Attachment 12	Possible Points	Page Limit
A. Team qualifications (excl. samples) ○ Submit samples of messaging/marketing materials as Attachment 13.	15	10
B. Utility meter and billing data	10	5
C. Processing capacity	10	6
D. Approach to SOW	25	15
E. Team structure (excl. resumes) ○ Submit resumes as Attachment 14 (2 pages max each)	5	8
F. Budget narrative	5	3
Total Possible Points	**70**	

RFP Manual, Section III – Required Format; Section IV – Technical Evaluation Criteria

Budget Forms and Cost Proposal Components

Technical and Cost Proposal Details

Cost Proposal: Attachment 7	Scored?	Included in final Budget?
Budget Overview	No	Yes
Subcontractors	No	Yes, final $ amounts TBD before contract execution
Travel	No	Yes
Equipment	No	Yes
Materials & Misc.	No	Yes
Milestone Payments	No	Yes
7a Direct Labor and Loaded Rates	Indirectly	Yes
7b1 Labor Scenario	**Yes, 15 points**	No, for scoring purposes only
7b2 Volume-Based Unit Deliverables Scenario	**Yes, 10 points**	Yes, individual unit costs become part of budget
7c Loaded Labor Rate Escalations	**Yes, 5 points**	Yes, escalation rates become caps in budget
Total Possible Points	**30**	

RFP Manual, Section III – Required Format; Section IV – Technical Evaluation Criteria

Direct Labor and Loaded Rates (Attachment 7a)

Technical and Cost Proposal Details

			Years 1-3												
Job Classification/Title (Examples are shaded in Grey)	Name of Employee (if known)	DL: Labor Rate (Hourly) Years 1-3 Max	Fringe Benefits % Max	Fringe Benefits Base	Fringe Benefits $	Indirect Costs% Max	Indirect Costs Base	Indirect Costs $	G&A % Max	G&A Base	G&A $	Profit % Max	Profit Base	Profit $	Loade Hourly Rate Ma
Vice President (ACME Prime)	Joe Smith	$ 65.00	40%	$ 65.00	$ 26.00	35%	$ 65.00	$ 22.75	15%	$ 65.00	$ 9.75	10%	$ 65.00	$ 6.50	$130.0
Senior Analyst A (XYZ Inc Subcontractor)	Ron Jones	$ 50.00	40%	$ 50.00	$ 20.00	35%	$ 50.00	$ 17.50	15%	$ 50.00	$ 7.50	10%	$ 50.00	$ 5.00	$100.0
Senior Analyst B (XYZ Inc Subcontractor)	Melissa Early	$ 55.00	40%	$ 55.00	$ 22.00	35%	$ 55.00	$ 19.25	15%	$ 55.00	$ 8.25	10%	$ 55.00	$ 5.50	$110.0
			0%	$ -	$ -	0%	$ -	$ -	0%	$ -	$ -	0%	$ -	$ -	$ -
			0%	$ -	$ -	0%	$ -	$ -	0%	$ -	$ -	0%	$ -	$ -	$ -
			0%	$ -	$ -	0%	$ -	$ -	0%	$ -	$ -	0%	$ -	$ -	$ -
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			0%	$ -	$ -	0%	$ -	$ -	0%	$ -	$ -	0%	$ -	$ -	$ -

- Direct labor rates, indirect, fringe, G&A, and profit rates **become part of the final Agreement**
- Rates bid are capped; Contractor is reimbursed only for **actual** rates up to the caps
- Rates and costs **cannot be increased later** because a cost, rate, person, indirect rate, escalation, or unit price was omitted or underestimated
- Include all classifications – Prime and Subs - anticipated to provide service on the Agreement
- Provide rates for years 1-3 and then years 4+

Profit Rules

- Contract allows profit, with limitations
- Bidders may include a profit rate on their DL (Direct Labor) and Loaded Rates tab of the budget form (Attachment 7a)

Permitted	Not Permitted
• Including up to a maximum total of 10% profit, fees or markups on SWI's own actual, allowable labor expenses • Both SWI and Subcontractors may earn profits	• Profit on Volume-Based Unit Deliverables, Travel, Milestone Payments • Profit on expenses further subcontracted

Exhibit B, Budget Details – Conditions for Payment; Budget Forms, Attachment 7a

Labor Scenario (Attachment 7b1)

Technical and Cost Proposal Details

One-Time Tasks	Subtask components, deliverables and assumptions to use for your scenario pricing.	Employee Classification	Fully loaded rate Years 1-3	# of hours	Total	Scenario Cost Justification
Subtask 2.2: Program Workflows Draft and Final	* Develop program workflows draft and final. Assume 2 rounds of CAM input. * Assume DOE does NOT require submittal of California-specific Workflows * Make recommendations on a process and create a workflow that would allow emergency equipment replacements. Assume 2 rounds of CAM input on that process and workflow as well.		*$0.00*		$0	
			$0.00		$0	
			$0.00		$0	
			$0.00		$0	
			$0.00		$0	
			$0.00		$0	
			$0.00		$0	
	Subtask 2.2 Program Workflows Total				**$0**	

- Used for scoring only – not part of the final budget
- Bidders provide estimates on the number of hours required of each classification to complete a representative sample, or a "Scenario" comprised of 6 Scope of Work Tasks
- 15 points:
  - 10 awarded based on cost
  - 5 based on Cost Justification

Volume-Based Unit Deliverables Scenario (Att. 7b2)

Technical and Cost Proposal Details

#	Subtask for reference	Subtask components and assumptions to use for your Unit Based Deliverables pricing. Please also refer to the Scope of Work.	Cost per Unit	# of Units	Subtotal per Unit Subtask
1	Subtask 4.5 Project Certificates	* Provide Participants with a third-party (i.e. not issued by Energy Contractor), post-project Certificate in accordance with DOE rules.		10,000	$0
2	Subtask 6.3 Conduct Low-Income Verifications	* Conduct income verifications as described in Subtask 6.3 (using the process developed in Subtask 6.2) including providing proof of low-income eligibility to potential Participants. Assume applicants will use a mix of tax returns and categorical eligibility documents as proof of low-income status.		3,500	$0
3	Subtask 7.2 Conduct Project Address Checks	* Conduct project address checks as described in Subtask 7.2 (using the process developed through Subtask 7.1.) Do not include cost of the the set-up of the API with DOE PNNL or set-up for another CAM-approved method as that work will be captured in Task 5.7.		11,000	$0

- Volume-Based Unit Deliverable pricing fixed through the term, including any extension
- The Unit Scenario provides Bidders with a list of Subtasks
- Bidders propose standard unit pricing for these tasks, with volume assumptions provided in the worksheet

Loaded Labor Rate Escalations

Technical and Cost Proposal Details

		Year 1-3	Year 4+		Year 4+
Job Classification/Title (Examples are shaded in Grey)	Name of Employee (if known)	Loaded Hourly Rate Max	Loaded Hourly Rate Max		Loaded Hourly Rate Escalation Rate
Vice President (ACME Prime)	Joe Smith	$ 130.00	$ 140.00		8%
Senior Analyst A (XYZ Inc Subcontractor)	Ron Jones	$ 100.00	$ 110.00		10%
Senior Analyst B (XYZ Inc Subcontractor)	Melissa Early	$ 110.00	$ 120.00		9%

Labor Escalation Years 4+ Scoring Table		
Escalation Rate Table	**Average Escalation Scoring**	**Highest Escalation Scoring**
0%-6%	3 points	2 points
6.01%-12%	2 points	1 points
12.01%-18%	1 points	0 points
>18.01%	0 points	0 points

- The Escalation Rates worksheet calculates the loaded rate escalations from Years 1-3 to Years 4+ by employee classification, for the purpose of scoring.

ECAMS: The Only Method of Delivery

All applications must be submitted through **CEC's Energy Commission Agreement Management System (ECAMS):**

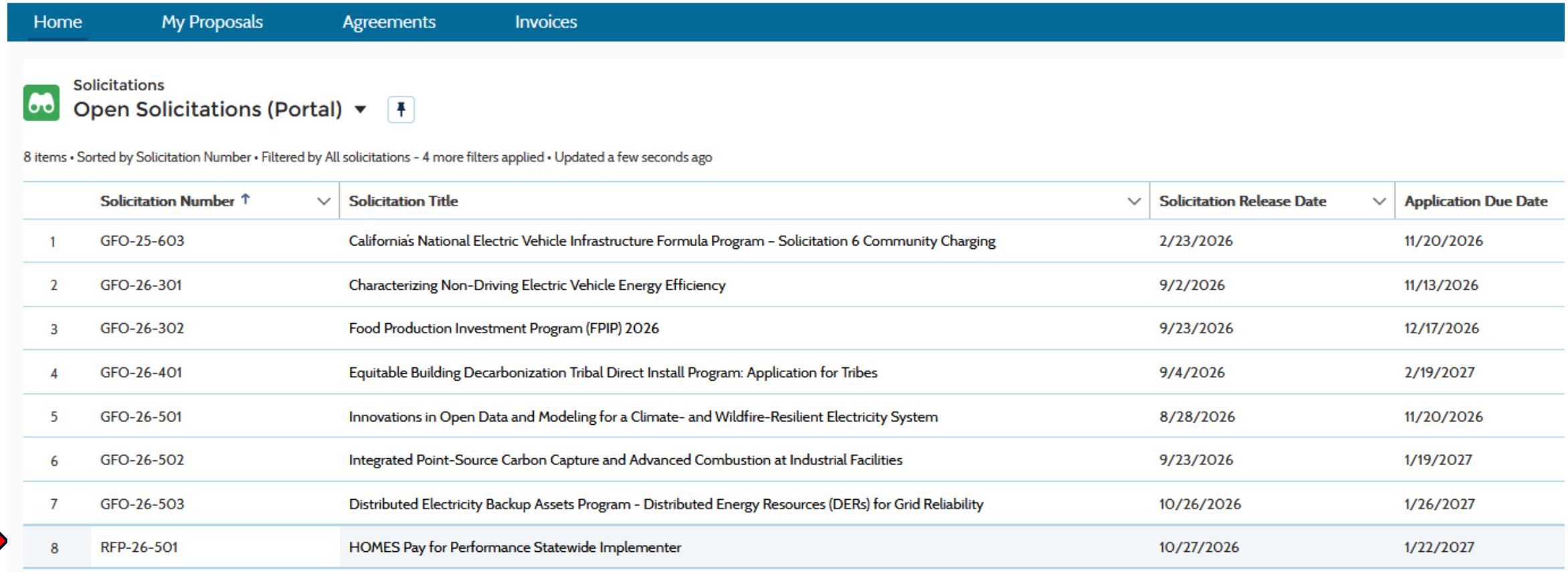
Start the process early!

- Deadline to submit applications is 11:59 p.m. on January 22, 2027. NO EXCEPTIONS
- CEC strongly encourages Applicants to upload and submit all applications by 4:00 p.m.
- Upload times may be much longer than expected. Please plan accordingly. Staff availability for consultation on the due date is not guaranteed.
- Direct ECAMS system questions to **ECAMS.SalesforceSupport@energy.ca.gov** well before the due date

See **ECAMS Registration Instructions** for instructions to create an account.

See **ECAMS Instructions for P4P Solicitation** for instructions on how to submit an application.

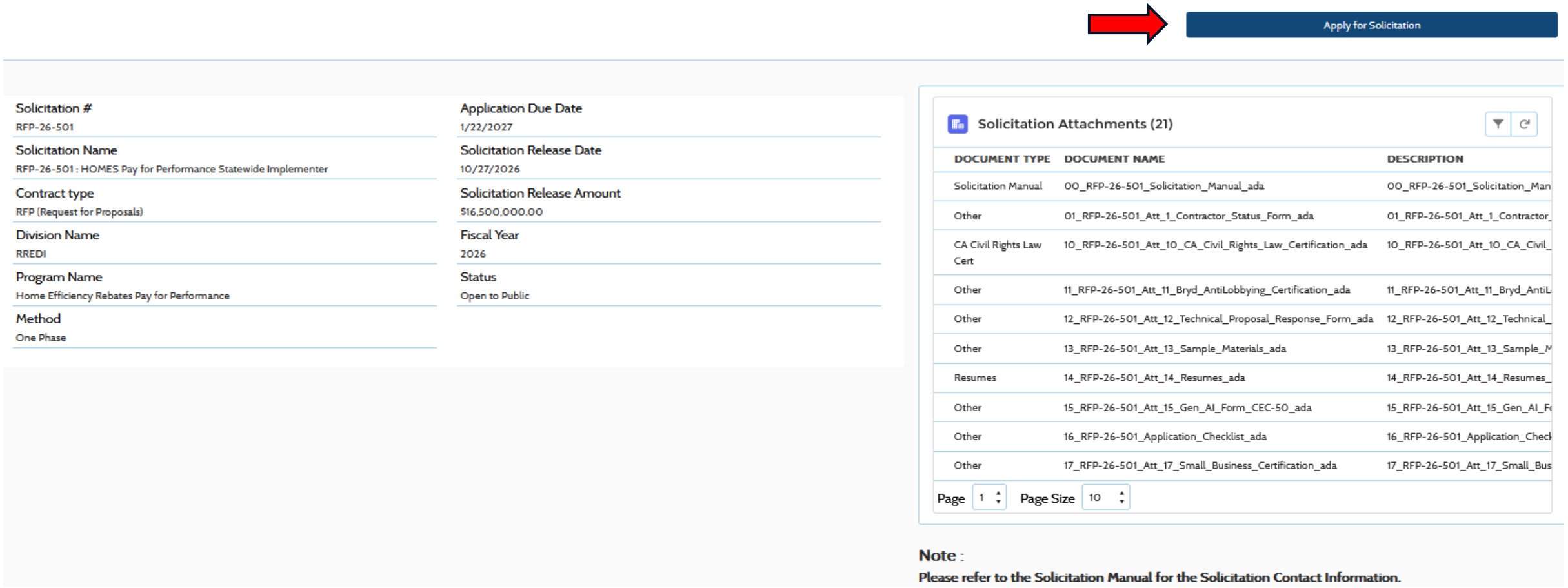
ECAMS Walkthrough: Select Solicitation



	Solicitation Number	Solicitation Title	Solicitation Release Date	Application Due Date
1	GFO-25-603	California's National Electric Vehicle Infrastructure Formula Program – Solicitation 6 Community Charging	2/23/2026	11/20/2026
2	GFO-26-301	Characterizing Non-Driving Electric Vehicle Energy Efficiency	9/2/2026	11/13/2026
3	GFO-26-302	Food Production Investment Program (FPIP) 2026	9/23/2026	12/17/2026
4	GFO-26-401	Equitable Building Decarbonization Tribal Direct Install Program: Application for Tribes	9/4/2026	2/19/2027
5	GFO-26-501	Innovations in Open Data and Modeling for a Climate- and Wildfire-Resilient Electricity System	8/28/2026	11/20/2026
6	GFO-26-502	Integrated Point-Source Carbon Capture and Advanced Combustion at Industrial Facilities	9/23/2026	1/19/2027
7	GFO-26-503	Distributed Electricity Backup Assets Program - Distributed Energy Resources (DERs) for Grid Reliability	10/26/2026	1/26/2027
8	RFP-26-501	HOMES Pay for Performance Statewide Implementer	10/27/2026	1/22/2027

RFP Manual, Section III – Method for Delivery; Exhibit I

ECAMS Walkthrough: Enter Application Information



RFP Manual, Section III – Method for Delivery; Exhibit I

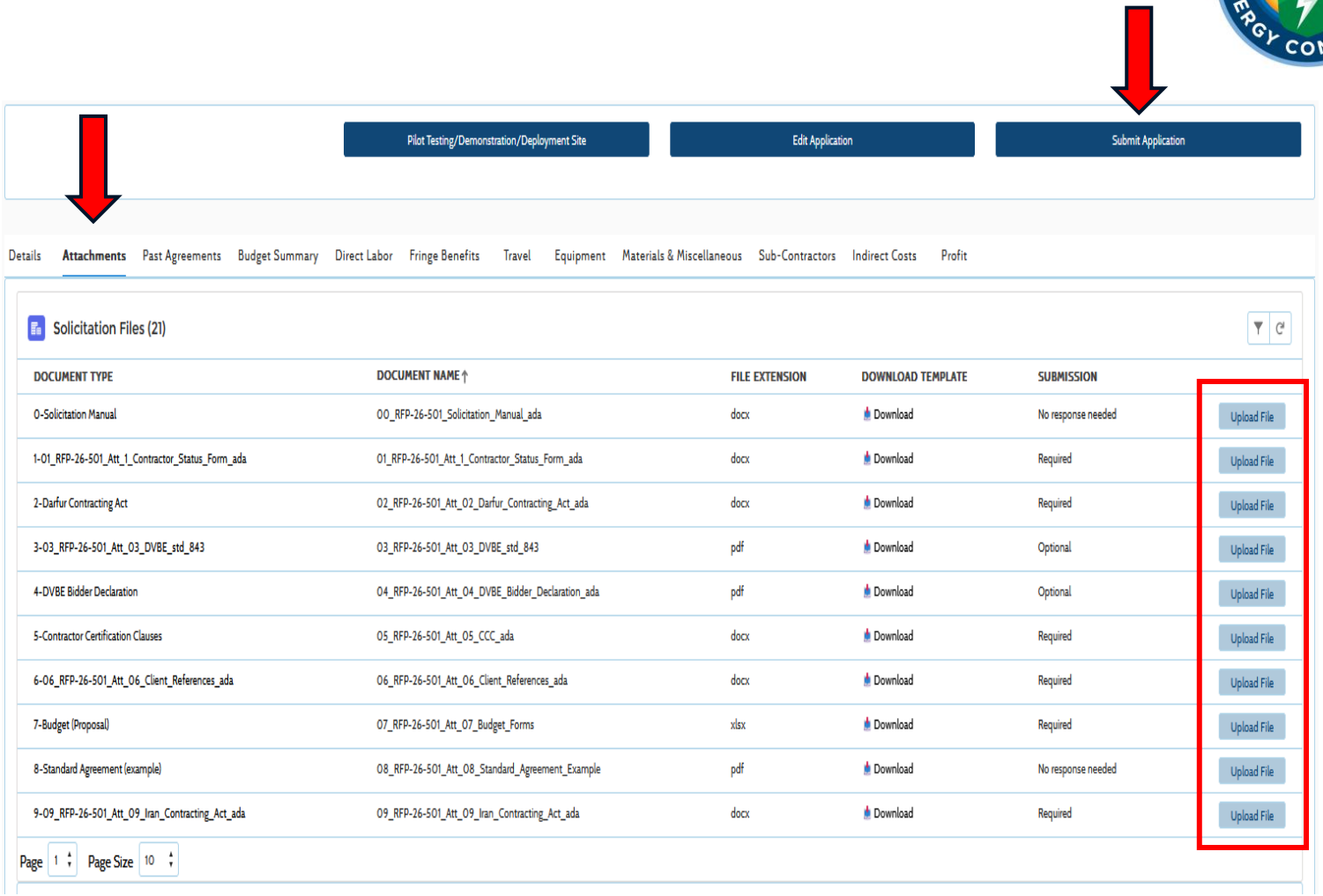
ECAMS : File Formats

- Complete the CEC-provided forms outside ECAMS; use ECAMS only to upload and submit them
- Microsoft Word (.doc or newer) and Excel formats, unless originally provided in another format
- Attachments requiring signatures may be scanned and submitted in PDF
- Attachment 7, Budget Forms: Excel format – *do not recreate it using ECAMS forms*
- All attachments marked “required” must be uploaded before the application can be submitted

RFP Manual, Section III – Method for Delivery

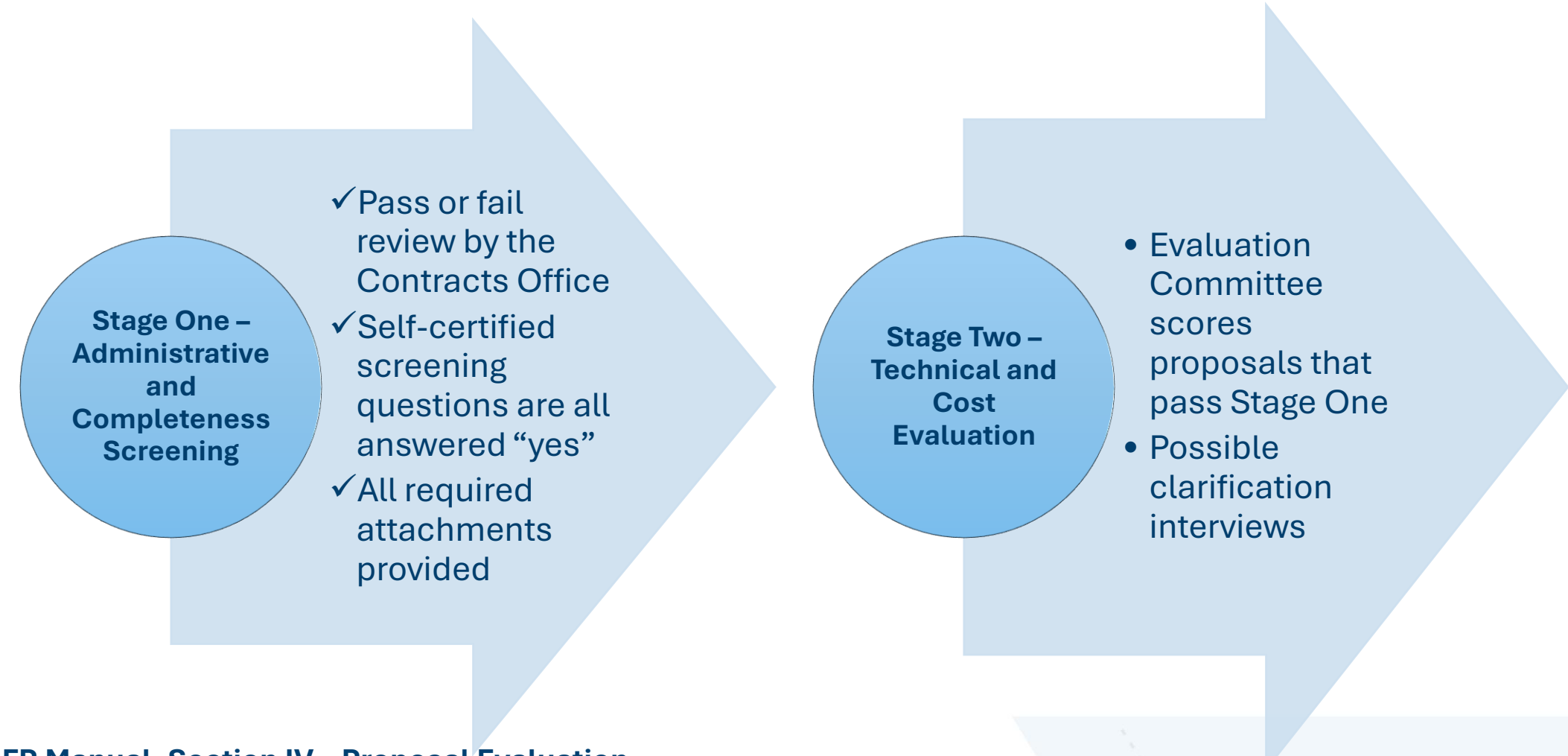
ECAMS Walkthrough: Upload Files and Submit

- Proposal documents are uploaded in the Attachments tab
- Refer to the Solicitation Manual to ensure all required attachments are uploaded
- Click on the Upload File buttons to upload each proposal document
- Click on the Submit Application button to submit your proposal



RFP Manual, Section III – Method for Delivery; Exhibit I

Evaluation: Two Stages



RFP Manual, Section IV – Proposal Evaluation

Preferences, Incentives, and Minimum Passing Score

Evaluation

- **Minimum:** Proposals must attain at least **70%** of total possible points **before** preferences and incentives are applied
- **DVBE**
  - No participation requirement for this RFP
  - Incentive is optional
  - Based on $16.5 million in Administrative Services

DVBE Participation Level	DVBE Incentive Points
0.01% - 0.99%	1
1.00% - 1.99%	2
2.00% - 2.99%	3
3.00% - 3.99%	4
4.00% or over	5

- **Small Business/Microbusiness** – 5% preference for DGS-certified small businesses

- **Award:** to the responsible Bidder with the **highest score** after all applicable preferences and incentives

RFP Manual, Section IV – Business Participation Programs

Resources and Updates

- **P4P Solicitation page**
  - RFP Manual and all attachments
  - DOE reference materials
  - ECAMS instructions for P4P slide deck
  - Today's recording and these slides will be posted
  - Written responses to questions and any addenda
- ECAMS help: **ECAMS.SalesforceSupport@energy.ca.gov**
- **Docket 23-DECARB-01**
  - Official written responses are posted first on the solicitation webpage and subsequently docketed
  - Subscribe to the docket on the **IRA Program Page**
- Keep checking the solicitation webpage for all RFP updates, including any addendum that changes the proposal deadline

Part V
Questions and Answers

Verbal responses are informational; official responses are issued in writing

Live Questions and Answers & Public Comment

Instruction

- 3 minutes or less per person
- 1 representative per organization

Zoom App/Online

- Click “raise hand”

Telephone

- Press *9 to raise hand
- Press *6 to (un)mute

When called upon

- Staff will open your line
- Unmute, state name, state affiliation, if any

3-MINUTE TIMER



For Phone Participation: Dial (669) 219-2599 or (888) 475-4499 (toll free)
Enter Webinar ID: 852 3517 7239 and Passcode 155788

Written Questions

Next Steps

- Submit written questions to the **Commission Agreement Officer** by **5:00 p.m. on 11/16/26**

Diana Grady, Commission Agreement Officer
California Energy Commission
715 P Street, MS-18, Sacramento, CA 95814
E-mail: diana.grady@energy.ca.gov

- Program staff will redirect inquiries to the Commission Agreement Officer
- Anticipated posting of written questions and answers, addenda: **12/16/26**
- Only written responses and addenda are controlling

Bidder Actions

Next Steps

1. Review the full RFP, including the Scope of Work and Terms and Conditions
   - This presentation and workshop recording will be posted to Solicitation Page
2. Subscribe to the IRA Docket
3. Register in ECAMS and become familiar with the system
4. Submit written questions to the Commission Agreement Officer by 5:00 p.m., 11/16/26
5. Review the published Q&A document and any posted addendums
6. Prepare a complete proposal including all Budget Forms
7. Submit through ECAMS before 11:59 p.m., 1/22/27

Adjourn

Thank you for your attendance!