



Request for Qualifications:

Energy Engineering and Financial Services

**Southern California Regional Energy Network (SoCalREN)
Public Agency Programs**

(This is an open RFQ whereby proposals can be submitted until August 31, 2021 and are evaluated on an as-needed basis)

June 16, 2020

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1. OBJECTIVE

The goal of this Request for Qualifications (RFQ) is to identify and award competitively-bid contracts to a pool of qualified consultants to provide energy services and financial support services on an as needed basis. Energy consultants will provide energy efficiency (EE), water efficiency, and distributed energy resource (DER) project engineering and/or program support to public agencies enrolled in the Southern California Regional Energy Network (SoCalREN). Financial consultants will provide financial services to public agencies by advising on financial options and identifying and securing financing needed to undertake energy efficiency and DER projects.

2. BACKGROUND

The Energy Coalition (TEC)

Founded in 1975, The Energy Coalition (TEC) is an innovative California based nonprofit 501(c)3 organization. TEC designs and implements programs and strategies that transform energy use and empower communities to leap into the future of clean energy. Since 2013, TEC has served as the program implementer for the SoCalREN Public Agency Programs.

Southern California Regional Energy Network (SoCalREN)

SoCalREN is one of the three Regional Energy Networks currently authorized by the California Public Utilities Commission (CPUC) as an energy efficiency program administrator. Funded by ratepayers and administered by Los Angeles County, SoCalREN provides energy efficiency services to residential customers and public agencies throughout the Southern California Edison (SCE) and Southern California Gas Company (SoCalGas) service territories, an area that encompasses more than 20 million people and 12 counties. Since its inception in 2013, SoCalREN has been committed to providing cost-effective innovative energy efficiency solutions that contribute to the state's energy savings objectives.

Under contract to Los Angeles County, TEC designed and currently implements five programs to serve public agencies throughout the SoCalREN territory. These programs include the Project Delivery Program, Pathway to Zero, Metered Savings Program, Revolving Loan Fund and Benchmarking Call to Action, which is a subprogram to the Pathway to Zero program and is funded by the California Energy Commission in order to provide DER services that are not allowable under EE ratepayer funding. Out of over 700 eligible public agencies, SoCalREN currently serves 146 enrolled agencies.

The SoCalREN Public Agency Programs take a comprehensive, customized approach to support the unique needs of public agencies. SoCalREN delivers a comprehensive suite of services through a collaborative approach that complements and leverages investor-owned utility (IOU) core program offerings. SoCalREN's program services, which are provided at no cost to the agencies, include project management, energy use analyses, benchmarking, audits, cost analysis, design performance specifications, construction management support, and IOU

incentive application support. Furthermore, the SoCalREN team assists enrolled agencies with financial services, providing support with identifying and securing financing needed to undertake energy efficiency and DER projects.

SoCalREN also supports public agencies with the identification and implementation of DER and other sustainability strategies when associated with an energy efficiency project at facilities located in disadvantaged community zip codes. Funding for DER technical assistance is provided by the California Energy Commission.

SoCalREN Project Managers coordinate with pre-qualified energy consultants who provide technical assistance in the form of energy audits, performance design specifications, and construction management support. Energy consultants may also provide energy use analysis, building retro-commissioning, measurement and verification services, other assistance tailored to the needs of the participating agencies, and program support upon request by SoCalREN staff. A detailed description of the energy consultants' scope of work is outlined under Scope of Services on pages 5-10.

SoCalREN's project delivery services offer a simplified construction procurement process that allows participating public agencies to access pools of highly qualified energy efficiency contractors through Sourcewell (formerly National Joint Powers Alliance). Sourcewell is a national public agency with legal authority to serve as a contracting agency for municipalities and other public agencies in all states, including California. Sourcewell contracts with contractors providing energy services as a part of SoCalREN and has a role in processing and issuing all task orders for construction services. Sourcewell has awarded a competitive bid contract with The Gordian Group to provide eziQC (Indefinite Quantity Construction) to Sourcewell members. Additionally, the program supports any procurement process, including sole-source or competitive bidding, based on an agency's preference and internal requirements.

SoCalREN recognizes that financing energy retrofits can be a big challenge for public agencies. Because of that, SoCalREN helps identify tailored financing solutions to fit each agency's specific needs and circumstances. SoCalREN also offers the energy efficiency Revolving Loan Fund (RLF), which can help bridge the gap while on-bill financing or other project funding is being secured. **SoCalREN Project Managers may also coordinate with a pre-qualified financial consultant who advises the public agency on financial options, assisting with identification of financing and securing the needed funding to complete a project.**

In summary, SoCalREN effectively addresses barriers commonly encountered when public agencies seek to improve energy use by:

- Offering highly customized solutions tailored to the unique needs of each agency;
- Providing competitively-bid retrofit services and third-party energy resources;
- Providing financial advisory services to find financing solutions to pay for construction;
- Significantly accelerating the delivery of energy savings;
- Achieving greater energy savings through whole building retrofits;
- Promoting greater transparency and contractor accountability;
- Achieving economies of scale and efficiencies that benefit all participants;

- Building capacity of public sector participants to better manage facility energy usage and meet the state’s energy and climate goals;
- Efficiently connecting energy consulting firms and contractors with multiple agencies;
- Leveraging the industry's talent pool and promoting collaboration; and
- Providing a unifying organizational structure to rally the industry towards a common mission.

Figure 1. Project Delivery Diagram



The CPUC has authorized funding for the Southern California Regional Energy Network through 2025.

For more information about the program please visit <https://socalren.org>.

3. TYPE OF CONTRACT

Contract with TEC will be on a time-and-materials basis.

4. SCHEDULE & SUBMITTAL INSTRUCTIONS

This is an open RFQ whereby proposals can be submitted through August 31, 2021 and are evaluated on an as-needed basis. Early submittals of proposals are encouraged. Consulting firms currently under contract do not need to respond to this RFQ.

A proposer may submit questions seeking clarification on the requirements of this RFQ. TEC will provide responses to all questions within 10 business days. Questions must be submitted by email to scrproposals@energycoalition.org using the subject line “RFQ 2020 Question - Your Company Name.”

Please submit all proposals in PDF format by email to scrproposals@energycoalition.org. For the email subject line, use the following naming convention: "RFQ 2020 Proposal - Your Company Name". The file should be saved using the same naming convention as the subject line.

TEC may invite select firms for an in-person or virtual interview.

All respondents will be notified if/when they are selected for contract award.

Milestone	Date
Release of RFQ	June 16, 2020
Deadline for submitting questions	Ongoing
Deadline for submitting proposal	Ongoing, but no later than 8/31/2021
Notification of selected consultants	Ongoing

5. OPEN RFQ MECHANISM AND PERIOD OF PERFORMANCE

There is no initial cap to the number of proposers. TEC will evaluate proposals on an as-needed basis until August 31, 2021. TEC anticipates the evaluation committee will convene periodically to review and evaluate new proposals, depending on SoCalREN's needs and on the number of new proposals that are received. Upon appropriate notice, TEC may forego or discontinue the rolling open enrollments to manage the number of resultant contracts.

The period of performance for any work resulting from this RFQ will begin as early as August 1, 2020 and will end on December 31, 2021. TEC reserves the right to shorten or extend the period of performance.

6. SCOPE OF SERVICES

TEC is soliciting the support of consultants to provide energy efficiency and DER project engineering and/or program support for energy retrofit services, including, but not limited to, audit, design, construction management support, commissioning, demand response assessments, measurement and verification services, water efficiency, financial advisory services, and other non-energy services. The consultants will support TEC with public sector building and infrastructure energy retrofits and management support services for energy projects for the SoCalREN. Energy retrofit projects will apply to buildings, street lighting, and water/wastewater treatment facilities and related infrastructure.

TEC has created a Project Delivery Manual as a guiding document for the program. The manual describes the procedures and best practices that the consultants shall adhere to when

delivering services. A copy of the Project Delivery Manual will be provided to all awarded consultants.

The list below provides the current scope of work and technical services provided by the SoCalREN Public Agency Programs. Depending on the needs of each agency, our Consultants will provide a combination of the services listed below tailored to the unique needs of each agency:

- **Energy Audits:** Consultant may conduct energy audits and related analyses and deliver energy audit reports within the specified format. This may include conducting site surveys to collect data and assess energy efficiency (EE) and Distributed Energy Resources (DER) opportunities. If cost-effective energy savings opportunities are identified, the Energy Consultant will collect the data needed to evaluate and make recommendations for potential energy efficiency and DER measures and assess demand response potential using calculation templates provided by SoCalREN. These energy audits will also incorporate all applicable IOU, CPUC, and California Energy Commission (CEC) incentives and rebates. The Energy Consultant must be familiar with applicable IOU incentive programs in order to calculate accurate IOU energy savings and support incentive application submissions. The Consultant will provide the recommendations in a written report and spreadsheet based on a template provided by SoCalREN in the Project Delivery Manual. These audit reports will be ASHRAE Level II and may be used to apply for IOU incentive or rebate applications. The consultant may also attend meetings to present the audit findings to an agency.
- **HVAC and HVAC Controls:** Consultant may be tasked with identifying energy efficiency opportunities for HVAC and HVAC controls equipment, proposing energy efficient HVAC equipment.
- **Interior and Exterior Lighting Retrofits:** Consultant may be tasked with reviewing interior and/or exterior lighting inventories and proposing energy efficient LED fixtures to replace existing HID and/or fluorescent fixtures. The Energy Consultant should be familiar with applicable IOU incentive programs as they relate to these types of retrofits.
- **Street Lighting and Traffic Safety Lighting:** Consultant may be tasked with reviewing street and traffic safety lighting inventories and providing HID to LED lighting retrofit recommendations. Consultant should be familiar with any applicable IOU incentive programs as they relate to these types of retrofits.
- **Water and Wastewater Energy Efficiency Audits and Retrofits Support:** For water and wastewater districts and water divisions with municipal governments, a Consultant may conduct an energy audit, provide process optimization and retrofit design assistance, and support construction management.
- **Process Optimization (Wastewater Treatment Plants):** Consultant may be tasked with providing energy savings analysis and proposals for process optimization projects at

wastewater treatment plants. Consultant should be familiar with IOU incentive programs as they relate to these types of projects.

- **Right Sizing Pumps and Pump Optimization:** Consultant may be tasked with providing energy savings analysis and proposals for right sizing and pump optimization projects. Consultant should be familiar with IOU incentive programs as they relate to these types of retrofits.
- **Nonresidential Pool Energy Optimization:** Consultant may be tasked with providing energy savings analysis and proposals for optimization measures at nonresidential public pools. Consultant should be familiar with any applicable IOU incentive programs as they relate to these types of projects.
- **Benchmarking:** Consultant may provide support services for benchmarking buildings for energy performance using ENERGY STAR® Portfolio Manager® (ESPM) and other programs as directed. Consultant may support on-site data collection, create building energy models for program screening and future savings analysis, and create energy savings reports using energy modeling tools.
- **Energy Efficiency Measurement and Verification (M&V):** Consultant may be tasked with measurement and verification services using a methodology based on the International Performance Measurement and Verification Protocol (IPMVP) . The Consultant may develop or review M&V plans for retrofit projects and complete implementation of the measurement and verification plans for estimating the achieved savings. In this case, the Consultant will produce an M&V report that will provide verified energy savings for the project in the format provided by the SoCalREN in the Project Delivery Manual.
- **Energy Retrofit Design:** Consultant may develop contractor Scope of Work narratives from the Scope of Work template and performance and design specifications, if necessary, for the measures selected for implementation. For general lighting and street lighting projects, this may include updating the retrofit tables developed in the audit phase indicating the type and locations of work and specifications for each unique retrofit. For mechanical, water, and wastewater projects this may include equipment evaluation, recommendations for equipment selection, and development of operational and control strategies. The Consultant may also review the contractor's cost estimates for accuracy and reasonableness.
- **Advanced Lighting Design:** Consultant may be tasked with providing advanced lighting designs for interior and/or exterior lighting retrofit projects. Consultant should be familiar with IOU incentive programs as they relate to these types of retrofits.
- **Outdoor Street Lighting GIS Support:** Consultant may be tasked with developing GIS reports (broken out per IOU meter and/or circuit) for agencies based on outdoor street lighting data, reviewing and reconciling IOU and customer inventories, analyzing as-built

data submitted by installation contractor, completing inventory and quality control alignments, and/or mapping out fixture locations for an agency based on provided data. The Consultant may also be asked to perform other GIS-related tasks.

- **Normalized Metered Energy Consumption (NMEC) Program:** Consultant may be tasked with performing energy audits, inspect and review projects, collecting and analyzing pre and post-intervention data, supporting with an M&V Plan, and quantifying savings at the meter for Normalized Metered Energy Consumption (NMEC) projects, whether agencies select to go through the IOU or SoCalREN's program to obtain services.
- **Demand Response:** Consultant may be tasked with developing and supporting Demand Response (DR) strategies for an agency. A consultant will be responsible for providing estimated peak demand savings, project costs, and cost savings information. The consultant may be tasked with interviewing facility personnel to identify detailed operating characteristics and energy use patterns, including major energy using equipment and controls. The consultant may also collect and evaluate additional facility data specific to demand response such as interval data, equipment switching and electrical circuiting and metering, perform a demand response assessment, and provide a written description of current demand response readiness and recommendations for improvements. Consultant should be familiar with IOU DR programs and incentives as they relate to these types of projects.
- **Electric Vehicle (EV) Charging Stations:** Consultant may be tasked with evaluating electricity consumption data, reviewing existing electric infrastructure, including meter locations, performing tariff analysis to estimate cost increases, reviewing available incentives and rebates, determining optimal number and location of charge stations, and analyzing installation and ownership models.
- **Solar Water Heating:** Consultant may be tasked with evaluating hot water demand and water heating energy consumption data, evaluating available areas for solar water heating systems, performing sizing analysis with estimated system costs and associated savings, and providing information and support accessing incentives for solar water heating systems.
- **Photovoltaic (PV) and Battery Storage:** Consultant may be tasked with evaluating electricity consumption data, evaluating available areas for solar PV and battery storage systems, reviewing existing electric infrastructure including meter locations, performing sizing analysis with estimated system costs and associated savings, and reviewing available incentives and rebates.
- **Permanent Load Shifting Via Energy Storage:** Consultant may be tasked with developing high-level analysis and support for thermal storage and other energy storage strategies for an agency to achieve permanent load shifting. A consultant may be responsible for evaluating electricity demand data and identifying systems that contribute

to peak electricity demand load, identifying recommendations to reduce peak electricity demand, providing estimated demand savings, project costs, and cost savings information. Consultant should be familiar with IOU programs and any available incentives as they relate to these types of projects.

- **Other Distributed Energy Resources (DER) Strategies:** Consultant may be tasked with developing other DER strategies that guide agencies on a path towards zero net energy. A consultant may be responsible for providing estimated peak demand savings, project costs, and cost savings information.
- **Whole Building Retro-commissioning:** Consultant may be tasked with providing retro-commissioning services as a standalone project or as an integrated part of a comprehensive energy retrofit project. Retro-commissioning is a long-term process which identifies, implements, and sustains low-cost operational and maintenance improvements for buildings and central plant energy systems. Generally, the goal of retro-commissioning is to help buildings operate as originally intended and reduce energy usage and costs while providing long-term monitoring and staff training to ensure persistence of the realized savings. Optimization employs energy monitoring and diagnostic protocols to achieve and continuously maintain a high level of system performance.
- **Behavioral Intervention:** Consultant may be tasked with developing and supporting behavioral intervention measures that focus on changing building occupants' energy related behaviors to provide consistent energy savings.
- **Strategic Energy Management:** Consultant may be tasked with developing and providing an agency with processes and systems needed to incorporate energy considerations and energy management, specifically ISO 50001, into their daily operations that would allow for continuous energy performance improvement.
- **Water Efficiency:** Consultant may be tasked with evaluating water use data, evaluating existing water systems including outdoor water use, irrigation systems and process water (i.e. chilled water systems), identifying water efficiency measures, and identifying and accessing related incentives or rebates.
- **Project Management:** Consultant may be tasked with providing general project management support, which might include assistance with defining the project scope, goals, and deliverables, cost estimating and budget development, and analysing and managing project risks.
- **Construction Management Support:** Consultant may be tasked with providing construction support services that may include review of the Contractor's submittals and construction drawings to determine constructability and adherence with the Contractor's

Scope of Work recommended design, inspecting work progress, reviewing execution of punch-lists, and providing building commissioning services.

- **Environmental Consulting Services:** Consultant may be tasked with providing environmental consulting services to government and/or education clients. This may include financial assistance services, risk assessment/mitigation, remedial solutions and cost estimations, and/or CERS Compliance.
- **Financial Advisory:** A Financial Support Services Consultant may be tasked with searching for and securing third party funding/financing on behalf of public agencies undertaking energy efficiency projects. The consultant may also be tasked with helping an agency to develop their own internal revolving loan fund for future energy efficiency projects. Consultants may conduct financial analysis, develop financial plans, perform due diligence, evaluate financial options, assist with negotiation and review of selected financing, and provide ongoing management as needed.
- **Other Technical Support Services:** For selected agencies and projects, the Consultant may provide other technical assistance as required, including but not limited to:
 - Utility rebate/incentive application support
 - Project financing analysis
 - Assistance with staff reports and documentation to obtain project approval
 - Contractor cost estimate review
 - Third-party review of project proposals and documents
 - Review of Energy Performance Contracts and proposals
 - Third party review of audits completed by other firms including ESCOs
- **General Program Support:** Consultant may be tasked with providing general Program support upon request, such as development of program procedures, documents or tools, analysis or summaries to support program development or reporting, and other miscellaneous tasks.

7. MINIMUM QUALIFICATIONS

- A. Experience working with public agencies such as cities, counties, school districts and water districts, preferably with agencies located in Southern California.
- B. Ability to provide timely, effective communication and support to deliver identified projects in a fast and efficient manner.
- C. Free from conflicts of interest arising from financial or other relationships with potential suppliers, constructors, financiers, or owners of related projects or products, and free from any relationships with competing services or programs.

D. Ability to meet the following insurance requirements:

- a. Subconsultant shall procure and maintain insurance from companies authorized to do business in the State of California and, except for policies issued on behalf of underwriters at Lloyds of London, assigned an A.M. Best's rating of no less than A-(IX), and in an amount, and, for such periods, as to protect THE ENERGY COALITION and Consultant against a claim arising out of, or related to, the performance under this Agreement.
- b. Insurance requirements are subject to change based on County of Los Angeles and/or CPUC requirements. Coverage requirements below are current as of June 16, 2020.

Coverage shall be as follows:

- (A) Commercial General Liability (ISO Form CG 0001 11/85 or its equivalent), with combined single limits of not less than \$1,000,000 per occurrence and \$2,000,000 in the aggregate,
- (B) Commercial Automobile Liability (owned, non-owned and hired) (ISO Form CA 0001 12/90 or its equivalent, with limits of not less than \$1,000,000 per occurrence;
- (C) Worker's Compensation Insurance with statutory limits, as required by the state in which the work is to be performed,
- (D) Employer's Liability Insurance of not less than \$1,000,000 policy limit; and
- (E) Professional Liability Insurance (including environmental liability coverage) of not less than \$1,000,000 per claim and in the aggregate.

8. SUBMITTAL REQUIREMENTS

All submissions shall be as concise as possible and include Sections A through F, as detailed below. Proposal must include forms in Appendices 1, 2 and 3 to be considered by TEC.

Section A: Cover Letter & Proposer Information Form

The cover letter must include a brief introduction of the Proposer, a brief description of the Proposer's experiences that make it a good fit for SoCalREN Public Agencies Programs, and a summary of the Proposer's approach to Programs.

The cover letter should be signed by an individual authorized to obligate the firm to the commitments contained in this proposal.

Complete and include Proposer Information Form (Appendix 1).

Section B: Areas of Expertise

Appendix 1 lists all the areas of expertise required for the SoCalREN Public Agency Programs. Please note that individual firms are not expected to have experience and expertise in all areas and are not required to submit for each of the areas of expertise. Instead, submit only for the areas which your firm is interested in and able to support.

TEC requires that your firm possess a **minimum of five years** of experience to be eligible to apply in a particular area of expertise. **The only exception is Normalized Metering Energy Consumption (NMEC), which requires a minimum of one year of experience.** Include the table in Appendix 2 in your proposal and indicate the areas of expertise where your firm has 5 or more years of experience.

To respond to one or more of the areas of expertise, a firm must complete the provided template (Appendix 3) for each area and include it with the proposal. For each area of expertise your firm is submitting:

- Please respond to the prompts provided in page 12-16 and list up to 5 previous projects that demonstrate your experiences and expertise.
- Limit your responses to the prompts to a maximum of one page per area of expertise.
- Please select projects that were completed within the past 5 years and preferably highlight your firm's experiences working with public agencies in Southern California.
- For each previous project listed, please be sure to provide project name, name of client, scope of project, year completed, and measurable project results.
- Note that past projects may be listed under more than one program area.

Area of Expertise Prompts

1. Energy Efficiency Audits

- Describe your firm's **approach to** completing energy audits of commercial buildings. Please include information about your methodology for calculating energy savings from interacting retrofit measures and use of energy modeling software.
- Describe your firm's **approach to** developing construction cost estimates for energy efficiency projects. Please include projects that factored in utility rebates and/or incentives as part of the construction cost estimates. Also include information about tools, references and relevant experience used to inform the cost estimates and the level of detail included.
- Describe your firm's **approach to** a dedicated quality assurance/quality control process to ensure the quality and consistency of the work product, including your approach to oversight of junior staff and subconsultants.
- List the building types in which your firm has significant auditing experience.

2. HVAC and HVAC Controls

- Describe your firm's **experience with** energy efficient HVAC and HVAC controls projects, particularly projects where your firm supported the design and installation of the HVAC equipment. Please reference projects where your firm provided support with utility rebates and/or incentives, and provided energy savings and cost savings calculations.
3. Interior and Exterior Lighting Retrofits
 - Describe your firm's **experience with** energy efficient exterior lighting retrofit projects. Please be sure to include the types of areas that were retrofitted, the lighting technologies, and any strategies you proposed to gain additional energy savings. Please reference projects where your firm provided support with utility rebates and/or incentives, and provided energy savings and cost savings calculations.
 4. Street Lighting and Safety Lights Upgrades
 - Describe your firm's **experience with** energy efficient street lighting, exterior lighting controls and/or energy efficient traffic signal retrofit projects. Please reference projects where your firm provided support with utility rebates and/or incentives, and provided energy savings and cost savings calculations.
 5. Water and Wastewater Energy Efficiency Audits and Retrofit Support
 - Describe your firm's **approach to** completing energy efficiency audits for water and wastewater agencies. Please include projects that received utility rebates and/or incentives. Also include information about your methodology for calculating energy savings resulting from measures and use of energy modeling software, if applicable.
 6. Process Optimization (Wastewater Treatment Plant)
 - Describe your firm's **experience with** condition assessments and process evaluations of wastewater treatment and reuse facilities, with a focus on energy management through process optimization. The experience should include analysis and/or implementation of energy efficient retrofits for process optimization, including upgrade and retrofit of monitoring and control systems, integration of modern and innovative treatment technologies, and bio-chemical optimization to reduce energy demand. Please include projects that received utility rebates and/or incentives.
 7. Right Sizing Pumps and Pump Optimization (Water Wells, Wastewater Treatment Plant)
 - Describe your firm's **experience with** energy efficient retrofits for water/wastewater/recycled water pumping, conveyance, and storage systems, including water system pressure zone management, booster stations, reservoir management, recycled water pumping and storage, and reuse distribution system optimization. The experiences should include your firm being responsible for analysis and/or implementation of energy efficient retrofits and incorporation of modern technologies for water/wastewater systems, load shifting and demand reduction. Please reference projects where your firm provided support with utility rebates and/or incentives, and provided energy savings and cost savings calculations.

8. Nonresidential Pool Energy Optimization
 - Describe your firm's **experience with** developing analysis and/or implementation of energy efficiency retrofits for commercial pool pump systems. Please reference projects where your firm provided support with utility rebates and/or incentives, and provided energy savings and cost savings calculations.
9. Benchmarking
 - Describe your firm's **experience with and approach to** benchmarking small to medium sized facilities. Outline benchmarking activities such as data collection, building energy models and creating energy savings reports. Describe your Firm's experience with ENERGY STAR® Portfolio Manager® (ESPM) or other energy efficiency benchmarking and/or performance programs.
10. Energy Efficiency Measurement and Verification (M&V)
 - Describe your firm's **experience with and approach to** energy efficiency measurement and verification. Please include the steps your firm utilizes to implement a robust M&V process.
11. Energy Retrofit Design
 - Describe your firm's **familiarity and demonstrated experience** with energy retrofit design projects.
12. Advanced Lighting Design
 - Describe your firm's **experience with** identification and design of advanced energy efficient lighting retrofits, and the specific advanced energy efficient lighting concepts typically included. Please include your firm's **approach to** advanced energy efficient lighting projects under the requirements of the 2019 Title 24 energy code. Please reference projects where your firm provided support with utility rebates and/or incentives, and provided energy savings and cost savings calculations.
13. Outdoor and Street lighting GIS Support
 - Describe your firm's **experience with** identification and assignment of unknown utility service accounts to lights using existing utility and City data. Your experience should include projects where your firm provided analysis of public sector street lighting and utility billing data using GIS analysis that enabled the retrofit project to proceed with construction.
14. Normalized Metering Energy Consumption
 - Describe your firm's experience with Normalized Metering Energy Consumption (NMEC) projects. Please include experience where your firm conducted the audit, reviewed pre-construction IOU billing data, proposed energy savings measures, prepared an M&V

plan, estimated energy savings, provided support for an NMEC application, and gathered post-construction consumption data to verify energy savings.

15. Demand Response

- Describe your **firm's experience** with providing demand response assessment to assist municipal facilities participating in demand response programs, including the evaluation and implementation of load monitoring technology, analysis of peak demand data, installation of equipment, and programming of energy management systems.

16. Electric Vehicle (EV) Charging Stations

- Describe your **firm's experience** with designing and/or supporting electric vehicle (EV) charging station projects.

17. Solar Water Heating

- Describe your **firm's experience** with designing and/or supporting solar water heating projects. Please reference projects where your firm provided support with utility rebates and/or incentives, and provided energy savings and cost savings calculations.

18. Photovoltaic (PV) and Battery Storage

- Describe your **firm's experience** with designing and/or supporting photovoltaic (PV) and battery storage projects.

19. Permanent Load Shifting (PLS) Via Energy Storage

- Describe your **firm's experience** with Permanent Load Shifting (PLS) projects. Include experience where your firm evaluated electricity demand data, identified recommendations to reduce peak electricity demand, provided estimated demand savings, and identified and accessed related incentives or rebates to achieve permanent load shifting.

20. Other Distributed Energy Resources (DER) Strategies

- Describe your **firm's experience** with other Distributed Energy Resources strategies (strategies other than PV, solar water heating, EV charging, etc.)

21. Whole Building Retro-Commissioning

- Describe your firm's **approach to** energy efficiency retro-commissioning for commercial buildings. In particular, please describe your approach for retro-commissioning for small to medium sized office buildings. Please reference projects where your firm provided support with utility rebates and/or incentives, and provided energy savings and cost savings calculations.

22. Behavioral Intervention

- Describe your **firm's experience** with providing behavioral intervention or developing behavior-based strategies to achieve energy savings.

23. Strategic Energy Management

- Describe your **firm's experience** with providing strategic energy management support, specifically experience with ISO 50001 to achieve continuous energy performance improvements.

24. Water Efficiency

- Describe your firm's **experience with** auditing and providing savings analysis for commercial water efficiency projects. Please include information about your methodology for calculating water savings and the various building types and outdoor areas where the projects were completed.

25. Project Management

- Describe your **firm's experience** with providing project management support for lighting and/or mechanical retrofit project implementation from audit through construction and close-out phases.

26. Construction Management

- Describe your firm's **experience with** construction management of medium to large sized energy efficiency projects. Specify your firm's level of involvement in the projects by indicating if you were the owner's representative or provided construction management support.

27. Environmental Consulting Services

- Describe your firm's **experience** providing environmental consulting services to government and/or education clients. Please include examples of your firm supporting a client with financial assistance services, risk assessment/mitigation, remedial solutions and cost estimations, and/or CERS Compliance.

28. Financial Advisory

- Describe your firm's **experience** with seeking out and securing third party financing for energy efficiency projects on behalf of a public agency. Examples should include projects where your firm provided financial analysis, performed due diligence, and provided the agencies with data they needed to proceed with the financing.

29. Other Technical Support Services

- Describe your **firm's experience** with one or more of the following areas: Utility rebate/incentive application support, project financing analysis, assistance with staff reports and documentation seeking project approval, contractor cost estimate review, support for agency's construction management with added oversight and budget and documentation management, third-party review of project proposals and documents, public information campaign and community outreach support.

30. General Program Support

- Describe your **firm's experience** with developing program procedures and guidelines, documents or tools, analysis or summaries to support program development and/or reporting.

Section C: Prior Experience Providing Services to the SoCalREN

If applicable, describe your firm's experience providing services to the SoCalREN. List the agencies you have supported and describe the services provided. Discuss your demonstrated ability to be responsive to SoCalREN program expectations, particularly quality of technical deliverables, budget, and schedule.

Section D: References

Provide references for at least 3 clients for which the Proposer has provided technical services similar to the scope of this RFQ within the last five years.

Reference information should include: contact person, address, telephone number, a summary of the work performed, date(s) of installation, and, if applicable, final contract amount.

Section E: Staffing Plan & Qualifications of Lead and Key Personnel

Briefly describe the proposed staffing plan including roles, responsibilities, qualifications and company affiliation of each lead and key personnel on the proposer team. Discuss team members' background and experience that demonstrate a strong ability to successfully perform the work relating to SoCalREN services.

Provide resumes containing sufficient information for TEC to evaluate the ability and experience of each lead and key team member to successfully fulfill their roles and complete the scope of services.

Section F: Schedule of Rates

Respondents shall state their proposed hourly rates offered on a time-and-materials basis for all applicable labor categories for the proposed services (e.g. Project Manager, Mechanical Engineer). Be sure to include labor categories and rates for administrative personnel.

9. PROPOSAL EVALUATION & CRITERIA

Responses submitted will be reviewed and evaluated by an internal Selection Panel at TEC. TEC will evaluate responses based on following criteria:

- Proposer's experience and qualifications (50%)
 - Proposer will be evaluated on their relevant experiences and capability to perform the required services based on information provided in Section B.
- Proposer's project team (20%)

- Proposer will be evaluated on the experiences and expertise of the proposed project team provided in response to Section E and, if applicable, during the interview.
- Cost evaluation (20%)
 - Proposer will be evaluated on the competitiveness of the hourly rates proposed in Section F.
- Strength of proposal (10%)
 - Proposer will be evaluated on the completeness, conciseness and organization of the Proposal submitted.

APPENDIX 1: Proposer Information

Please complete and include in Proposal.

CONTACT INFORMATION	
Firm's Legal Name	
Mailing Address	
Telephone	
Email Address	
Name and Title of Main Contact for This Proposal	
Signature / Date*	
INFORMATION ABOUT FIRM	
# of Years Firm Has Been in Business	
# of Years Division or Department Has Been in Operation	
Average Total Sales (\$) Generated in Last 3 Years by Division or Department Responding to RFQ	

* must be signed by an individual authorized to obligate the company to the commitments contained in this proposal.

APPENDIX 2: Areas of Expertise Checklist

Please complete and include this table in Section B of your Proposal.

Areas of Expertise	Check if Your Firm Has Minimum 5 Yrs of Experience	Check if Your Firm Is Applying to Provide Service in this Area of Expertise
1. Energy Efficiency Audits		
2. HVAC & HVAC Controls		
3. Interior & Exterior Lighting Retrofits Support		
4. Street Lighting & Safety Lights Upgrades		
5. Water and Wastewater Energy Efficiency Audits and Retrofits Support		
6. Process Optimization (Wastewater Treatment Plant)		
7. Right-Sizing Pumps and Pump Optimization (Water Wells, Wastewater Treatment Plant)		
8. Nonresidential Pool Energy Optimization		
9. Benchmarking		
10. Energy Efficiency Measurement & Verification		
11. Energy Retrofit Design		
12. Advanced Lighting Design		
13. Outdoor Street Lighting GIS Support		
14. Normalized Metered Energy Consumption (NMEC) <i>(** Requires 1 year of experience)</i>		
15. Demand Response (DR)		
16. Electric Vehicle (EV) Charging Stations		
17. Solar Water Heating		
18. Photovoltaic (PV) & Battery Storage		
19. Permanent Load Shifting (PLS) Via Energy Storage		
20. Other Distributed Energy Resources (DER) Strategies		
21. Whole Building Retro-Commissioning		

22. Behavioral Intervention		
23. Strategic Energy Management		
24. Water Efficiency		
25. Project Management		
26. Construction Management Support		
27. Environmental Consulting Services		
28. Financial Advisory		
29. Other Technical Support Services		
30. General Program Support		

APPENDIX 3: Area of Expertise Application Template

For **each** area of expertise for which you are applying to provide service, please describe your experiences and approach and a list of **up to** 5 past projects completed in the past 5 years that demonstrate your ability to successfully deliver results.

Areas of Expertise / Services Proposed	
Area of Expertise	
Describe Your Firm's Approach and/or Experiences (Refer to Section B section of RFQ for more detailed instructions)	

Past Projects

Project #1	
Project Name / Client	
Scope of Project	
Year Completed	
Measurable Project Results	

Project #2	
Project Name / Client	
Scope of Project	
Year Completed	

Measurable Project Results	
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Project #3	
Project Name / Client	
Scope of Project	
Year Completed	
Measurable Project Results	

Project #4	
Project Name / Client	
Scope of Project	
Year Completed	
Measurable Project Results	

Project #5	
Project Name / Client	
Scope of Project	
Year Completed	
Measurable Project Results	