



Legal's approval 00/00/00

Request for Proposal

California Integrated Energy Audit Tool

Southern California Edison Company

2010– 2012 Program Period

This Request for Proposal is sponsored by Southern California Edison Company
under the auspices of the California Public Utilities Commission

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1. INTRODUCTION

Southern California Edison Company (SCE), San Diego Gas and Electric Company (SDG&E), Southern California Gas Company (SCG) and Pacific Gas and Electric Company (PG&E), referred to as the California Investor Owned Utilities (CA IOU), design, administer and implement large portfolios of customer energy efficiency, demand response, solar photovoltaic and solar thermal programs. Customers often need assistance to overcome the barriers that prevent their participation in those program offerings. An energy audit can help customers successfully overcome many of those barriers. Audits provide customers with an assessment of their energy use, and provide useful recommendations on how to reduce their energy consumption and peak demand. Audits are available to residential and nonresidential customers. Residential audits are available as either online, telephone, or mail-in surveys. Nonresidential audits are delivered through either onsite or online services.

As part of the Integrated Demand Side Management program (IDSM), the CA IOUs goal is to maximize the effectiveness of the online audit/survey mechanisms. The objective of an integrated energy audit tool is to combine the site specific recommendations for energy efficiency, demand response, solar photovoltaic, solar thermal, and water conservation measures into a single, cohesive customer plan and report. Through this solicitation, the CA IOUs seek either a single contractor or a team of contractors under a single prime that can develop and deploy an online integrated energy audit tool for residential customers and small commercial customers. For the purposes of this solicitation, a small commercial customer has a maximum monthly electrical demand of less than 200 kW and consumes less than 50,000 therms annually.

A. Background

The California Long Term Energy Efficiency Strategic Plan (Strategic Plan) encouraged the integration of the full range of demand-side management options including energy efficiency (EE), demand response (DR), and distributed generation as fundamental to meeting California's energy goals. In Decision D09-09-047, the California Public Utilities Commission (CPUC) approved the CA IOUs statewide IDSM program and directed them to submit compliance advice letters addressing the directive in Ordering Paragraph 33. The CA IOUs submitted advice letters to the CPUC and a final joint supplemental letter on March 10, 2010 that replaced all prior advice letters in their entirety. Decision D09-09-047 defined eight tasks that the IDSM Statewide Task Force would engage to promote the advancement of IDSM. One of those specific tasks is "...the development of cross-utility standardized integrated audit tools using PG&E's developed audits as a starting point."

As stated in the March 10, 2010 supplemental advice letter, the audit tools development will address the following broad areas:

“Compliance

- Modify existing tools (as technically feasible) and incorporate in new tools necessary modules and analytics that meet the expectations listed in Appendix C of the October 30, 2008 Assigned Commissioner and Administrative Law Judge’s Ruling Requiring Supplemental Filings in A.08-07-021 et al, or other requirements addressed by regulatory proceedings.
- Enhance existing audit tools to more explicitly demonstrate the cost benefits of energy efficiency prior to solar system installation and its sizing.”

“Integration

- Incorporate electricity, natural gas, energy efficiency, demand response and self-generation analysis in all tools and a single customer report for each type of audit, as appropriate.
- Incorporate water conservation analysis in association with electricity and natural gas savings.
- Incorporate green house gas reduction calculators and/or conversion tables, as applicable.
- Refer to or incorporate in audit tools applicable rate analysis modules, as appropriate.
- Incorporate IOUs’ adopted and recommended emerging technologies, as appropriate.
- Coordinate with the nonresidential Continuous Energy Improvement (CEI) sub-program.”

“Standard Resources

The IOUs will review and adopt a common set of external resources, engineering and energy management tools that provide customers with a consistent methodology of energy conservation and financial benefits, and lead customers to invest in recommended projects. Such tools may include, but are not limited to:

- Department of Energy Best Practices Tools,
- eQuest,

- SPC Calculator,
- AirMaster,
- MotorMaster,
- Energy Star Portfolio Manager,
- DEER, and
- IOU work papers.”

“Advanced Technologies

- Research and incorporate analytics that address customer behavior changes as a greater potential for overall energy usage reduction in certain markets. The analytics may include traditional benchmarking tools, such as Energy Star®, as well as a new generation of tools and databases available on the market.
- Research and incorporate analytics that address the economic benefits for IDSM implementation. Such tools may include calculation of lost opportunities if recommended measures are not implemented in a timely manner.
- Implementation of those technologies that may become available as infrastructure is built at each IOU.”

The expectations outlined in Appendix C of the October 30, 2008 ruling, listed verbatim, are:

“Characteristics Expected of Enhanced Energy Audit

- **Verifiable:** Shall follow a CPUC or CEC staff accepted protocol and use energy improvement measures and costs published in public databases.
- **Site-specific:** Shall utilize customer-specific energy consumption data incorporated by easy means, acknowledging the trade-off with *user friendliness*.
- **User-friendly:** May be implemented by either a host customer or a professional auditor (with possible option for ongoing into greater detail if the user so desires).
- **Comprehensive:** Shall identify both gas and electric DSM measures in audit, including EE, DR, and DG, as well as optimization technology across these measures.

- **Accessible:** Can utilize any accurate medium, including online or other automated means.
- **Compatible with CSI program:** Shall combine energy audit findings with appropriate solar calculator results into a report on energy improvement opportunities, allowing customers to understand the relative costs of pursuing the full range of DSM options.”

“Expected Integrated Audit Report Content

- Customer friendly format.
- The report will include educational references and materials.
- Current Load/Estimated annual consumption and bill (using utility supplied 12 month history or a proxy calculation).
- Estimated size, output, and cost of any proposed DG system (Solar Hot Water, Solar PV, or other DG resource), including estimates both “before” and “after” all cost effective EE and DR measures are installed.
- A comprehensive list of cost-effective DSM measures applicable to that site.
- An estimated cost and annual energy savings (as \$ and % of bill) of each EE measure.
- Payback analysis or IRR for individual EE and solar measures, listed in ascending order of fastest payback or descending order of return on investment, and aggregate savings of bundled measures.
- A list of building energy use assessment services and tools available for use by the building owner for further investigation – for commercial buildings this shall include information on available retro-commissioning services.
- Affirmation with signature that customer has read and understands the information. This affirmation must be available to the CSI Program Administrators and other DSM programs.”

B. General Eligibility and Minimum Contractor Requirements

SCE, on behalf of the CA IOUs, seeks qualified Bidder proposals to develop and deliver an online integrated energy audit tool. Bidders shall demonstrate their experience in the

successful development and deployment of online customer web tools, and demonstrate detailed technical knowledge of DSM options. It is within the CA IOUs sole judgment to determine whether a Bidder meets the general criteria for selection. Any proposal that does not meet the minimum contractor requirements shall be rejected without review.

At a minimum, the Bidder's proposal shall address the following areas:

1. Demonstrate experience in the design and development of residential and small commercial software based energy audit tools,
2. Demonstrate successful experience in the development and deployment of online web solutions,
3. Demonstrate knowledge and experience with energy efficiency, demand response, the existing solar calculation tools required by all CSI programs, and the potential interactions between DSM measures,
4. Demonstrate experience with major IT environments, data security, data warehouses, and SQL databases, and ability to integrate systems,
5. Demonstrate experience in the development of user-friendly customer interfaces,
6. Demonstrate experience in integrating educational tools into online customer applications,
7. Demonstrate the ability to translate technical information into customer-friendly tools and language,
8. Proven track record in the delivery of time critical software projects,
9. Proven track record in the timely response to client needs and maintenance issues of software systems,
10. Provide a preliminary project plan and schedule for the overall software development and deployment project, and
11. The CA IOUs prefer that Bidders have a local presence in California to ensure timely coordination and responsiveness. This does not restrict the Bidders ability to use subcontractors that reside outside of California.

The total amount for the purchase order as a result of this solicitation is expected to range from \$1,500,000 to \$3,000,000. _

C. Key Dates:

SCE, on behalf of the CA IOUs, reserves the right to amend the schedule of the RFP activities as necessary. Should there be changes to the schedule timeline, when and if such a change is deemed reasonable or necessary in its sole and absolute discretion. In the event that the schedule is changed, all Bidders shall be notified in writing of the updates from the SCE Procurement Agent in a timely manner.

TABLE 1.1: KEY DATES

The following are key dates in this solicitation:

Key Event	*Key Date
RFP Release	8/23/10
Information Webinar and Conference Call for Bidders	8/30/10
Bidders' Questions Due	8/31/10
SCE's Answers to Bidders' Questions Due	9/9/10
Bidders' Proposals Due – Stage One	9/22/10
Notification to Selected Bidders to advance to Stage Two	10/13/10
Selected Bidders – Stage Two presentations	10/19 – 10/21/10
Notification of Proposal Selection, Subject to Negotiations	10/29/10
Purchase Order/Contracts Issued (As Early As)	12/15/10

2. SCOPE OF WORK REQUIRED

A. GENERAL DESCRIPTION OF THE WORK REQUIRED

The Bidder(s) will create a standardized statewide integrated set of energy audit and survey tools for the CA IOUs that provide customized recommendations based on customer energy usage profiles, both gas and electric, and site specific characteristics, both technical and operational. The integrated energy audit system will produce a customer report that combines the impacts of energy efficiency, demand response, distributed generation, and water conservation measures along with their financial and green house gas reduction benefits. Through this request for proposals (RFP), the CA IOUs seek one or more companies, under a single prime contractor, to develop a statewide integrated energy audit tool, to be called the California Integrated Energy Audit Tool (CA IEAT), on a purchase order basis. This document provides the high-level business requirements for the system.

B. LOCATION VISITS

The selected Bidder(s) may be required to attend meetings and work from time to time at SCE's Customer Energy Efficiency and Solar Division headquarters located at 6042 North Irwindale Avenue, Suite A, Irwindale, CA, 91702. Meetings may also take place at any of the CA IOUs facilities in San Diego, Los Angeles, Rosemead, and San Francisco.

C. DISCLOSURE OF AFFILIATIONS

The CPUC, in Decision 05-01-055, prohibited any transaction between a California IOU (individually PG&E, SCE, SDG&E and SCG) and any program implementer for energy efficiency that is an affiliate of an IOU. All potential Bidders/respondents will disclose any and all affiliations with any California IOU. Such disclosure will be included in the response hereto. Failure to accurately respond will result in immediate rejection and disqualification from this solicitation.

D. ACTUAL WORK REQUIRED

This RFP invites bids to develop, and potentially deploy, a new set of software applications that together provide the capabilities of an integrated energy audit tool for residential and small commercial customers as described by the following general business requirements.

General Business Requirements

Audit System Design

1. The audit system shall follow a modular software design that separates the system's presentation, business rules, and data layers into distinct subsystems. The approach

- will allow for future calculation tool modules to be introduced into the system following open data exchange protocols with the underlying data store infrastructure.
2. The audit system software design will allow for possible integration within each individual utility's information technology (IT) environment if necessary, and work closely with each utility's IT team to ensure system security and compatibility.
 3. The audit system shall include "calculators" for Green House Gas (GHG) reduction, solar PV and solar thermal, whole house performance, DR strategies, water conservation, etc.
 4. The audit system shall integrate with each utility's existing and future data stores to allow for data mining and the building of predictive models to support market potential, market trends, etc. and allow for the development of statistical metrics.
 5. The audit system shall provide a secure administrator tool for utility managers to manage utility specific content, messages, and DSM measures. This feature shall incorporate a detailed audit tracking system that records what changes were made, when, and by whom.
 6. The audit system shall save the customer's Audit Report and DSM Plan online and allow them to revisit it, edit it, and update what they have implemented over time.
 7. The audit system shall allow the customer to save the Audit Report and DSM Plan as an Adobe Acrobat (PDF) file.
 8. The audit system will be accessible through each IOU website for their customers. The system should support other means of completing the survey such as telephone and mail-in surveys. (CPUC Appendix C Requirement)
 9. The audit system shall provide an automated method to upload the information from mail-in surveys into the system.
 10. The audit system will use the same user interfaces and calculation tools across all utilities with exceptions to each utility's data stores, utility program links, etc. Hence, any upgrades to the user interfaces and calculation tools will be available to all the utilities.
 11. The first release of the CA IEAT system will meet the energy audit needs of residential and small commercial customers.

12. Use open data exchange (input/output) protocols for all the calculation and reporting modules in the system. If necessary, develop the protocols and make them available to all developers of energy modeling tools.
13. The audit system shall be designed to meet enhanced accessibility requirements (Web Content Accessibility Guidelines).

User Interface

1. The audit system shall implement a customer feedback feature.
2. The audit system customer interface shall be standardized statewide, be user friendly and allow for a detailed survey to be completed in a reasonably short time period. (CPUC Appendix C Requirement)
3. The audit system shall give customers the option to use either a “quick” or “detailed” survey mode through a process that improves upon the site specific recommendations as the customer provides more detailed information.
4. The audit system shall offer the non-residential customer the opportunity to learn about saving energy at home and direct them to the residential energy survey.
5. The audit system shall ask residential customers if they either own or manage a business, and if they would like to learn about energy savings opportunities for their business facilities, and then direct them to the commercial energy audits.
6. The small commercial portion of the audit system should have an additional user interface, standardized statewide, that allows experienced commercial auditors to conduct expanded, detailed surveys with more comprehensive and complex technical information capture that can support benchmarking and personalized, actionable energy saving and DR recommendations. With more in-depth information, more sophisticated recommendations could be formulated. The utilities measure databases, work papers, and emerging technology efforts should be tapped for this purpose.
7. The audit system should have an optional follow-up checkbox for customers to request their utility to contact them about either their energy audit or request additional information on energy efficiency, demand response, solar PV, solar thermal, water conservation, etc. The option shall obtain from the customer their preferred method of contact, i.e., US mail, telephone, e-mail, chat, etc.
8. The audit system user interface shall be implemented in such a way as to allow the customer to learn as much about the recommended measures as desired, from general information to specific equipment details.

9. The audit system will support multiple languages: Spanish, Korean, Tagalong, Vietnamese, Chinese, etc.
10. The residential portion of the audit system shall have an additional interface, standardized statewide, that allows an experienced auditor to conduct the survey over the telephone with a customer.
11. The audit system shall provide a function that allows for support staff to view and assist a customer that is in the process of completing an energy audit through either an online chat or a telephone call.
12. The residential portion of the audit system shall have a printed questionnaire, standardized statewide, that allows a customer to complete an energy survey and receive their Audit Report and DSM Plan through the mail.

Demand Side Management (DSM) Measures

1. The audit system screening and recommendations will include EE, Behavioral, DR, Solar PV and Solar Thermal, and Water Conservation measures.
2. The audit system shall include all the relevant measures that are in each utility's DSM portfolio.
3. The audit system shall provide a methodology for selecting tips and investment recommendations to be tailored to customer specific characteristics.
4. The residential portion of the audit system shall generate recommendations that are relevant to the customer's dwelling type: single family home, apartment, mobile home, urban, rural, etc.
5. The non-residential portion of the audit system shall generate recommendations that are relevant to the customer's small commercial building type: small retail, small office, etc.
6. The audit system suggested recommendations will also align with the comprehensive list of measures identified in each IOU measure databases and ongoing programs.
7. The audit system's site specific recommendations shall be comprehensive and include both natural gas and electric DSM measures (EE, DR, DG, and Water conservation) as appropriate for the customer type and size. (CPUC Appendix C Requirement)

8. The detailed integrated audit system list of DSM recommendations shall be comprehensible and site specific. The estimates will be site, premise, and account specific using historical energy usage data. (CPUC Appendix C Requirement)
9. The audit system shall include DR measures that address Critical Peak Pricing (CPP) tariffs such as building pre-cooling and programmed lighting reductions during summer event days.
10. The audit system shall include permanent load shifting recommendations, as part of the DR measures, in the energy audits as these measures may affect the sizing of a solar PV system. Examples: residential customers shifting swimming pool pumps runtime away from Noon to 6:00 PM, summer weekdays, and commercial customers moving forklift battery charging away from the same time period.
11. The audit system shall consider DSM measures that may rely on two-way communications through advanced utility meters and home area networks (HAN).
12. The integrated audit system should ask the customer whether to consider electric vehicle charging, natural gas fueled vehicles, and include the impacts in the analysis and recommendations.

Analytical Methods

1. The audit system will combine detailed customer energy usage data, including future data from smart meters as it becomes available, along with available housing, facilities, and demographic information with back-end analytics to generate customer specific recommendations in concert with the audit interview process.
2. The CA IEAT System will provide estimated savings, installation costs, Green House Gas (GHG) reduction, simple paybacks, percent of annual bill savings, and/or Return On Investment (ROI) for each recommended Energy Efficiency (EE), Demand Response (DR), and Solar measure based on data published in public databases. (CPUC Appendix C requirement)
3. The audit system will estimate the energy savings, demand reduction, and monies saved for each recommended measure.
4. The small commercial and residential audit recommendations should be specific to the customer business type (small office, small retail, etc.), type of residences, e.g., apartment, mobile home, single and two story detached homes, etc., and rate tariff if applicable.

5. The residential portion of the audit system shall support Whole House performance savings estimates.
6. The audit system financial analysis should present the life cycle benefits and paybacks of several levels of EE/DR/Solar measure implementations and reflect the remaining DSM opportunities.
7. The audit system shall benchmark and compare the customer's facility/home, ranking it among similar facilities/homes, program participants and a control group. The audit system benchmark may interact with the Energy Star benchmarking tool.
8. The audit system shall use customer supplied information to select similar customers for benchmarking.
9. The audit system shall disaggregate the customer's annual energy usage into weather and non-weather dependent end use loads using either 12 or 24 month weather normalized historical energy usage data and public databases not limited to the Residential Appliance Saturation Survey (RASS), the Commercial End Use Survey (CEUS), and the Database for Energy Efficient Resources (DEER), etc. Present the information graphically to the customer.
10. The audit system may use available customer demographic information, census data, etc., to help complete the survey, only after the customer verifies and/or corrects the data.
11. The audit system should use the full installation cost of DSM measures in its customer financial analysis. The system should contrast the economics of full installation costs to incremental measure costs in the case of equipment replacement upon burnout.
12. The integrated audit system financial analysis shall use the actual utility rate tariffs to determine customer savings, i.e., residential tiers, air conditioning cycling credits, commercial time-of-use charges, critical peak pricing, etc.
13. The integrated audit system shall estimate the combined impacts, i.e., interactive effects, of EE, DR, and Solar measures on the facility's total annual electric and natural gas usage.

Integration with the California Solar Initiative

1. The audit system shall allow the customer to choose which EE measures to consider installed before the solar system sizing analysis: All Measures, No/Low Cost Measures, etc.

2. The completed audit should be available, both through the data store and as a saved file, to any of the respective utility's online incentive applications that require a completed energy audit as a condition of the program such as the statewide California Solar Initiative (CSI) program.
3. The audit system shall obtain the customer's affirmation, with some form of electronic signature that he has read and understood the information the audit has provided to him regarding the sizing and cost impacts that installed DSM measures may have on either a solar PV or solar thermal system. The affirmation must be made available to the CSI Program Administrators. (CPUC Appendix C Requirement)
4. The solar photovoltaic calculation module for the audit system shall be based upon the current calculation tool, i.e., the CSI-EPBB calculator, to satisfy CSI program requirements.

Integration with Existing Energy Efficiency and Demand Response Programs

1. The audit system shall inform the customer which recommended measures are eligible for incentives and integrate with the application process when and where feasible.
2. The audit system shall provide a customer a list of possible building energy use assessment services and tools available for use by the customer for further investigation including retrocommissioning services for commercial buildings. (CPUC Appendix C Requirement)
3. The audit system shall update the customer profile and DSM Plan when either the customer informs the audit system of the installation of an Energy Star appliance, etc., or through a feed from the approved EE program application system.
4. The audit system should keep customer consumption data as up to date as possible.
5. The audit system will provide customers at least 12 months of their current usage and billing. If there is insufficient data to complete 12 months, the system shall estimate the missing usage and billing using reasonable statistical methods. (CPUC Appendix C Requirement)
6. The audit system shall allow the customer to track their usage and demand against IDSM and solar system installation milestones (Does their usage track with the measures as they are implemented and commissioned?)

7. The audit system shall identify meaningful educational opportunities for the customer at the utility's energy centers. Connect customers to the appropriate websites for them to register and/or pursue self-guided learning.
8. The existing IOU energy audit systems contain customer audit information that should be transitioned, as much as possible, to the new system.

Customer Reports

1. The audit system report shall contain before and after load profiles based on recommended DSM measure categories that the customer selects. (CPUC Appendix C Requirement)
2. The audit system report shall provide the comprehensive list of site specific recommended DSM measures along with their individual energy and economic impacts.
3. The audit system should sort the recommended measures based on the customer's choice, i.e., highest to lowest financial benefit, electric energy savings, natural gas energy savings, electric demand reduction, simple payback, ROI, GHG reductions, install costs, etc. (CPUC Appendix C Requirement)
4. The integrated audit system and its reports will contain a standard legal disclaimer regarding the recommended measures, estimates, etc.
5. The integrated audit system report should present the impact of implementing EE and DR measures on the size and installation costs of Solar PV and Solar Thermal systems. (CPUC Appendix C Requirement)
6. One of the audit system set of load profiles for residential electricity and natural gas usage should be in the form of monthly stacked-bar charts when the customer is on a tiered domestic rate tariff. The stacked-bars shall represent the energy usage within each of the rate tariff tiers. This could help customers visualize that the DSM measures save on the most expensive kWhs and therms they use each month.
7. The audit system report shall be divided between a customer friendly summary with charts, etc., a customer specific, integrated DSM implementation plan with links to available DSM programs, detailed technical and financial analysis sections, annual energy usage disaggregation chart for weather and non-weather dependent end uses, benchmarking comparisons, and links to additional information and educational opportunities.

In addition, Bidders will provide in their proposals the following:

- Separate pricing for development and hosting the CA IEAT system, with hosting considered at either a Bidder site or at each utility site;
- Ongoing maintenance support and training;
- Full system documentation, user manuals, including system engineering specifications, data dictionaries, process-flow diagrams, function and system specifications, online support, and technical phone-line support;
- Joint unit and system testing and quality control testing with the IOU teams;
- Full system support for at least three years;
- Provide a fixed-cost estimate. Bidders will be allowed to further submit alternate pricing structure for consideration; and
- Billing rates for all work performed under the proposed purchase order shall be on a per hour basis as set forth below in Table 3.2. These rates shall remain fixed for the duration of the purchase order unless otherwise authorized in writing by SCE.

E. DESCRIPTION OF WORK REQUIRED

The successful Bidder will develop the new statewide CA IEAT system working closely with the SCE project manager and the CA IOU integrated audit tools team. The successful Bidder must be able to effectively manage and complete the overall software development project including any deliverables from technical subcontractors. The successful Bidder will be responsible for the complete documentation of the system, including components and modules supplied by subcontractors.

Task Group 1: Kick-off meeting with the statewide integrated audit tools team and the IDSM Task Force.

Task Group 2: Finalize the business requirements and develop the complete functional and system requirements for Phases 1 and 2 of the project.

Task Group 3: Overall, detailed Project Plan & Schedule for Phase 1 and 2. The project plan shall identify all milestones and deliverables, and include a transition plan for existing energy audit data.

Task Group 4: Phase 1 Software Development: Residential and small commercial integrated energy audit system with Solar Photovoltaic Calculator and GHG calculators

Task Group 5: Testing and Deployment of Phase 1 system

Task Group 6: Phase 2 - Development of the rest of the system

Task Group 7: Testing and Deployment of Phase 2 System

Task Group 8: Ongoing maintenance

- Include service level agreements

Task Group 7: Project wrap-up meeting and delivery of final documentation.

F. CONSIDERATIONS AND BIDDER'S BILLING RATE

Billing rates for all work performed under the proposed purchase order(s) shall be fixed price. Labor rates need to be identified, billed in quarter-hour increments. These rates shall remain firm for the duration of the purchase order unless otherwise authorized in writing by SCE, on behalf of the CA IOUs.

3. BIDDER’S PROPOSAL FORMAT

Table 3.1 is a checklist and descriptions of items that must be included in the Bidder’s proposal in order for it to be deemed “**Responsive**” (pass score) in the threshold assessment. Descriptions of each item on the checklist are further discussed in this Section.

TABLE 3.1: PROPOSAL CHECKLIST

(Bidder must copy a completed checklist into their proposal.)

SECTION 3	Included? (Y/N)	Section/ Page Number
ITEM A – COMPANY INFORMATION		
ITEM B – WORK TO BE PERFORMED		
1. SCOPE OF WORK TO BE PERFORMED (INCLUDING TASK GROUPS AND ITEMS LISTED IN SECTION 1B GENERAL ELIGIBILITY AND MINIMUM CONTRACTOR REQUIREMENTS)		
2. APPROACH TO SCOPE OF WORK FOR EACH TASK GROUP		
ITEM C – BIDDER’S SKILLS (CAPABILITIES) AND EXPERIENCE		
1. OVERALL COMPANY CAPABILITIES		
2. OVERALL EXPERIENCE (AS IT RELATES TO TASK GROUPS)		
3. REFERENCES		
ITEM D – STAFFING PLAN		
1. KEY PERSONNEL, POSITION/TITLE, PRIMARY RESPONSIBILITIES PER TASK GROUP.		
2. INCLUDE RESUMES		
ITEM E – LABOR RATES		
<i>Table 3.2 – Hourly Rates</i>		
ITEM F – SUPPLIER RESPONSIBILITY		
1. SCE'S ENVIRONMENT, HEALTH AND SAFETY, ETHICS & COMPLIANCE CHECK LIST		
2. SUPPLIER DIVERSITY DBE (WMDVBE) FORM		
ITEM G – SCE’S GENERAL TERMS AND CONDITIONS		
1. ACCEPTANCE IS MANDATORY		
2. EXCEPTIONS		

Bidder proposal evaluations will consist of 2 parts the “threshold” and “weighted” evaluations. The Bidder’s Proposal Format is used for the threshold assessment to determine the responsiveness of the proposal (pass or fail). Bidder must copy a completed checklist into their proposal.

Proposals that do not include all items listed in Table 3.1 or any substitution and/or the use of

a preprinted reference to a Bidder's General Terms and Conditions in lieu of SCE's General Terms and Conditions will render the Bidders proposal to be considered “**Non-Responsive**” and subject to a disqualification (fail) score. Proposals receiving a Responsive (pass) score will then go onto Part 2 the **Proposal Evaluation Criteria** (see Section 5 weighted scoring).

Item A. General Company Information

1. Name of the organization or individual proposing the work;
2. Main contact name, address, phone number, email, etc.;
3. Number of employees; and
4. Total revenue for 2007, 2008, and 2009.

Item B. Scope of Work to be Performed

1. **Scope of work to be performed:** Please indicate the tasks and/or task group(s) that your company is proposing to perform.
2. Approach to scope of work: Discuss your approach to the work described in each task group your company proposes to perform.
3. Identification of deliverables and milestone dates; dates should be attached to deliverables;

Item C. Bidder's Skills (Capabilities) and Experience

1. **Overall Project Experience and Results:** The Bidder shall discuss (or provide a table of) their company's past experience in implementing successful professional services with similar breadth, scope, and technical skill set. For each experience discussed, please indicate performance goals and results.
2. **References:** The Bidder shall provide three (3) client references including company name, contact information (name, title, phone number, fax, and email), and a brief description of Bidder's work for reference and how it relates to work that Bidder proposes.
3. **Demonstration website:** The Bidder shall provide a URL address which demonstrates the capabilities of the Bidder's proposed software.

Item D. Staffing Plan

Please provide a staffing plan. The staffing plan must, at a minimum, address the following:

1. Identification of key personnel, position title, and their primary responsibilities per task (please include resumes);
2. Description of qualifications for individual staff members per task.

Item E. Labor Rates

1. Proposed hourly rate by staff category (see Table 3.2). Bidders are required to fill in the information listed in Table 3.2 which includes a list of positions, responsibilities, and fully burdened hourly rate for each position.

TABLE 3.2: HOURLY RATES

Staffing Direct Labor	Responsibility	Proposed Hourly Rate (\$)
[Position Title #1]		
[Position Title #2]		
[Position Title ##]		

Item F. Supplier Responsibility

SCE’s Environment, Health and Safety, Ethics and Compliance, and Supplier Diversity programs are essential to SCE’s success and the success of our suppliers and contractors. Per CPUC General Order 156, Bidders must supply information on their WMDVBE status and subcontracting plans. SCE will consider this information in evaluating bids. See SCE’s Procurement Proposal Request document for SCE’s Supplier Responsibility Requirements/Checklist.

Item G. SCE’s General Terms and Conditions

1. **Substitution:** Bidder shall **NOT** substitute, nor use a preprinted reference to Bidder’s general terms and conditions in lieu of SCE’s General Terms and Conditions. Any proposal received with such substitution shall be considered Non-Responsive and subject to disqualification.
2. **Exceptions and/or Revisions:** SCE will not accept any changes or modifications to SCE’s General Terms and Conditions, unless there are exceptional circumstances and in those situations the Bidder proposing the change will be marked down and may be passed over as a result of any proposed changes to SCE’s General Terms and Conditions. Any revisions and/or exceptions proposed by Bidder to SCE’s General Terms and Conditions must be clearly stated in a separate section of Bidder’s proposal submittal. Such section

shall be clearly identified by the title “Revisions/Exceptions to the General Terms and Conditions”. All proposed revisions/exceptions must be submitted in the form of a “red-line” markup of the existing provision(s) in SCE’s General Terms and Conditions. In addition, Bidder must clearly identify the "exceptional" reason for the proposed change(s) and the cost impact of the change(s). SCE shall not consider a proposed change that is not provided in “red-line” markup form or does not include the reason for, and cost impact of, the requested change.

3. **Scoring:** Bidders are scored based upon all responses, and the nature and extent of exceptions taken to SCE’s General Terms and Conditions are part of the Bidder evaluation criteria. Proposed changes to SCE's General Terms and Conditions are discouraged and will impact Bidder's ultimate selection.

4. PROPOSAL EVALUATION CRITERIA

The proposal review process consists of two phases. Phase one will consider responsiveness and weighted scoring. The CA IOUs may use this phase to screen potential bidders to a list of the top three (3) to five (5) highest scoring proposals. Phase two will consist of an onsite presentation and demonstration of the bidder’s organizational structure and capabilities to perform the work required by this RFP. Further information will be provided to the three to five top bidders at the time this determination is made.

Bidder proposal evaluations consist of (2) two parts:

Part 1 - the threshold assessment to determine the responsiveness of the proposal (Pass or Fail) Refer to Section 3 Table 3.1, and;

Part 2 - the proposal “weighed” scoring (for proposals that meet the minimum threshold requirements in part 1). SCE will first evaluate the responsiveness criteria on a Pass/Fail basis. Proposals that receive a “Pass score” in Part 1 will be further scored according to the scoring criteria and weights listed in Table 4.1.

TABLE 4.1: WEIGHTED SCORING

(NOTE TO PM- PLEASE REVIEW THIS TABLE AND CONFIRM WITH THE SOLICITATIONS TEAM THAT THE HIGHLIGHTED “%” AND THE ASSOCIATED SCORING CATEGORY DESCRIPTIONS MEET YOUR NEEDS!)

<p>1. Approach to the Work to be Performed – 20% (Section 3, Item B)</p>
<p>Bidder's approach to the work will be evaluated and will receive a higher score if the approach is reasonable and documented to achieve the results required. Bidders that respond without changes to the General Terms and Conditions will receive a higher score.</p> <p>(Score range: Approach is not reasonable = 0; Approach is very reasonable = 4)</p>
<p>2. Skill (Capabilities) and Experience – 30% (Section 3, Item C)</p>
<p>The Bidder will be evaluated and will receive a higher score if they demonstrate past skill and experience in implementing professional services contract(s) with similar breadth, technical skill set, and scope.</p> <p>(Score range: No experience & track record not demonstrated = 0; Very experienced & track record demonstrated = 4)</p>
<p>3. Staffing Plan – 10% (Section 3, Item D)</p>
<p>The Bidder will be evaluated and will receive a higher score if the key personnel identified have the qualifications and work experience that matches the RFP scope.</p> <p>(Score range: Individual(s) technical capability not demonstrated = 0; Individual(s) very technically capable = 4)</p>
<p>4. Labor Rates (or "Total Project Cost" where applicable) – 30% (Section 3, Item E)</p>

The Bidder will be evaluated on labor rates (or total project cost where applicable) and will receive a higher score if the rates (or total project cost) show reasonableness for the task(s).

(Score range: Labor rates are not reasonable = 0; Labor rates are very reasonable = 4)

5. Supplier Responsibility – 10% (Section 3, Item F)

Bidder's response to Supplier Responsibility categories will be evaluated and a will receive a higher score if all categories apply to Bidder's organization.

(Score range: Answered "No" in at least one item in each category = 0; Answered "Yes" in each subcategory and maximized your firm's position in Section 4.e. of the Supplier Responsibility Requirements/Checklist = 4)

5. SUBMISSION OF PROPOSAL

A. RFP - Questions and Communications

All written questions to be submitted to Jim Alpago no later than August 31, 2010 by 2:00 p.m. (Pacific Daylight Savings Time). For all Bidders' questions received by 2:00 p.m. (Pacific Daylight Savings Time) on August 31, 2010, SCE will provide a written response which will be posted on the PEPMA Website by September 9, 2010. A WebEx webinar and conference call is scheduled for August 30, 2010. Details regarding the WebEx webinar and conference call will be posted on the PEPMA website. WebEx invitations will be sent via e-mailed to all Bidders that have registered on the PEPMA website for this solicitation by August 29, 2010.

Bidder Inquires and Concerns: All Bidder inquiries and concerns related to the solicitation process, commercial and contractual terms, or the contract/purchase order shall be directed to James Alpago (james.alpago@sce.com).

B. Submission of Proposal Responses

Bidders must submit both hard copy and electronic versions of their proposals by the due date and times listed below. Any proposals received after the date and time will be rejected.

1. **Time and Place for Submission:** Refer to SCE's procurement department cover document(s) for critical information and instructions on submittal of the hard copy of your proposal document. Below is some key information about the proposal due date, time, and place for submission:

Due Date: September 22, 2010
Time Due: 2 p.m. (Pacific Daylight Savings Time)
To: James Alpago, Procurement Agent
Attention: Edison Material Supply
Address: Southern California Edison Company
8631 Rush Street, Second Floor,
P.O. Box 800
Rosemead, CA 91770

2. **Hardcopy Proposal Submission:** Bidders are required to submit four (4) hard copies (double or single-sided, with one (1) copy being unbound and three (3) copies bound) of their proposal, with signed cover sheets, including all submittals required by this RFP.

In addition to the hard copies, Bidders shall include with its submission one electronic copy of their entire proposal (including supporting documents) on CD ROM using Microsoft Office 2003 / 2007 software (Word, PowerPoint, Excel). Adobe Acrobat documents (i.e., PDF files) are not acceptable.

3. **Electronic Copy Proposal Submission:** In addition to submitting a hard copy response to this RFP on September 22, 2010 at 2:00 p.m. (Pacific Daylight Savings Time), Bidders must also submit an electronic copy to: <https://www.pepma-ca.com/CAIEAT> by September 22, 2010 at 2:00 p.m. (Pacific Daylight Savings Time). The electronic submission does not fulfill the hard-copy submission requirements as outlined in Section 5B, Submission of Proposal Responses, above. Bidders must register on the PEPMA Website no later than September 9, 2010 at 2:00 p.m. in order to submit their proposals electronically.

Note: The hard copy and electronic copy content must be the same. If any differences between the electronically submitted proposal and the hardcopy proposal are found the Bidder's proposal will be immediately disqualified.

4. **Verification of Receipt of Proposal:** It is the Bidder's sole responsibility to ensure that its proposal is received at the address specified in this package by the deadline for submission.
5. **Errors or Omissions:** A Bidder that discovers an error or omission in its proposal response package may withdraw that package and resubmit one, provided that it does so before the deadline for submission of proposal responses.
6. **RFP Withdrawal:** SCE reserves the sole and absolute right to withdraw this RFP at any time before the duly authorized execution of the contract/purchase order with Bidders for any reason including, but not limited to, action by the CPUC that modifies or withdraws the Program. In its sole and absolute discretion, SCE may accept or reject any or all proposals, and may accept other than the most cost-effective proposal. SCE will not assume any liability, under any circumstances, to any Bidder submitting a proposal in response to this RFP.
7. **Proposal Preparation Costs:** Bidder accepts any and all costs and expenses incurred prior to the duly authorized execution to the Contract/Purchase Order and will not seek reimbursement of any costs and expenses from SCE.
8. **Proposals Not Confidential:** After the deadline for receipt of proposals, SCE will not keep confidential either the proposal submitted in response to this RFP or any

contract/purchase order arising from the solicitation. In addition, SCE may submit Bidder proposals to the CPUC for review. Furthermore, SCE will not assume any liability to a Bidder or other party as a result of any public disclosure of any proposal or contract/purchase order.

9. **Proposal Review – Clarifications:** SCE may (but shall not be obligated to) perform clarification interviews or request clarifications in writing. A clarification interview may be performed via telephone and will focus on clarifying the information set forth in the proposals, rather than offering Bidders the opportunity to revise its proposal. Bidders will not be compensated for the time spent or the costs incurred for the interview(s) or for responding to a written request for clarification.
10. **Terms and Conditions of Submission:** All proposals, together with all other documentation, submitted in connection with this RFP shall become and will remain the property of SCE and will not be returned to the Bidder. By submitting a proposal pursuant to this RFP, Bidders acknowledge and agree that (a) they will be fully bound by the terms and conditions of this RFP in submitting their proposals, (b) they have had the opportunity to seek independent legal and financial advice of their own choosing with respect to the RFP and their proposals, (c) they have obtained all necessary authorizations, approvals and waivers, if any, required by them as a condition of submitting their proposals, (d) they are submitting their proposals subject to all applicable laws, and (e) they have not engaged and will not engage in communications with any other Bidder in the RFP concerning the price or other economic terms contained in their proposals and have not engaged in collusion or other unlawful or unfair business practices in connection with this RFP.
11. **Program Implementation:** It is expected that the work anticipated by this RFP will begin no later than January 20, 2011.