



**ADDENDUM NUMBER 1: CLARIFICATIONS,
QUESTIONS AND ANSWERS**

FOR

**DESIGN, IMPLEMENTATION, MANAGEMENT AND
EVALUATION SUPPORT FOR DECARBONIZATION
AND INNOVATION PROGRAMS**

**RFP Issued: April 15, 2019
Addendum Number 1 Issued: April 30, 2019**

Question #1: *Does the consultant selected for Task C need to be independent from those selected for Tasks A and/or B, or can it be a subcontractor?*

Answer #1: The consultant selected for Task C will be independent from those selected for Tasks A and/or B. The Task C contract will be a stand-alone contract.

Question #2: *Where can we find more information on the programs listed under Task A?*

Answer #2: Please see the published materials for agenda item #4 from the April 2019 Board of Directors meeting for more information on approved programs and their current state of development: <https://www.svcleanenergy.org/board-meetings/>.

Question #3: *Please clarify that, per the RFP, Task A is anticipated to be ~\$200k per year for 3 years, and Tasks B & C at \$150k for 2 years.*

Answer #3: Yes. However, the Bidder is welcome to propose and provide justification for a higher budget level for any of the three tasks.

Question #4: *Task A.1.8 states, "establish SVCE's program on a comprehensive program tracking software to easily monitor all data relating to the program. The software should integrate with SVCE's systems to periodically transition data to SVCE. SVCE will retain ownership of all data." What are SVCE's systems that would need to integrate with a consultant-developed platform so we can evaluate potential automated options for passing information? Does SVCE require automated integration (APIs) with any of their current systems in the application platform being developed?*

Answer #4: SVCE has evaluated multiple program tracking and management software options but currently has no program-focused software system in place. All program-specific information at this early stage of program portfolio development is currently being managed in spreadsheets. As such, SVCE would welcome the Bidder's description of one or more integration options they could support and associated requirements. SVCE does not require APIs at this time.

Question #5: *Task A.2.4 states, "through the processes identified with SVCE staff, route approved projects for required rebate payment and other processing." Will SVCE staff be issuing rebate payments or will the consultant be receiving funding to issue payments?*

Answer #5: SVCE has not at this time determined the specific entity who will be issuing rebate payments. SVCE would welcome the Bidders' suggestions for proposed approach based on their experience managing related programs.

Question #6: *Who is the marketing consultant mentioned in Task A.1.4 and what is their role versus what the consultant role would be in terms of the marketing, education & outreach? / Can SVCE provide more information about the marketing consultant supporting these programs – specifically, are they currently in place and what level of coordination will be expected with them?*

Answer #6: SVCE currently works with a freelance design firm for web and graphic design needs to support marketing activities. SVCE has not at this time determined the exact role and delineation of responsibilities of the consultant under contract for Task A versus the design firm as it relates to marketing programs. As such, SVCE would welcome the Bidders' suggestions for proposed approach based on their experience managing and marketing related programs.

Question #7: *Task A.3.3 states. "Provide all additional reporting documentation required for compliance with the program funding sources." Can you provide more detail around the reporting- the frequency of reports, format, required data points, etc.?*

Answer #7: SVCE provides both monthly high-level updates and a more comprehensive quarterly programs report to its Board. Basic information on program status (enrollment numbers, rebate expenditures, etc.) will be required for those reports. The entire programs portfolio will undergo a comprehensive evaluation on an annual basis by the consultant selected for Task C, for which more detailed information will be required. For programs that are co-funded by external agencies, those agencies may have additional reporting requirements. SVCE's FutureFit Heat Pump Water Heater Program is co-funded by a grant from the Bay Area Air Quality Management District. The grant requires quarterly reporting covering progress or completion of enumerated milestones. Milestones include application tracking methodology, agenda and attendees related to meetings with stakeholder and customer groups, release of RFP for third party trainer for city inspection staff, release of RFP for third party data logger, applications received and paid, etc.

Question #8: *On the bidders call, it was mentioned that the FutureFit Your Home Program is funded by the air district. Can SVCE provide information about the incentive amounts offered, how they are distributed, and if there is an annual budget cap on them?*

Answer #8: The Heat Pump Water heater portion of FutureFit is partially funded by the Bay Area Air Quality Management District (BAAQMD), aka the Air District. The Air District has committed to \$325,000 total over the course of the two-year grant. \$141,750 are allocated for incentive payments. Incentive payments occur in two blocks – the first in advance of program launch, the second once the initial funds are demonstrated to be exhausted. \$183,250 are allocated for non-incentive program expenses and are provided on a quarterly basis. SVCE has matched that \$325,000 with our own funds for a total program budget of \$650,000.

Question #9: *The SVCE programs website shows six different areas: Power supply, Buildings and Homes, Transportation, Grid Integration, Education and Outreach, and Innovation. For Task A, which of those six categories would the contractor be implementing? Does the scope of Task B cover only the Innovation area? For Task C, which of those six categories would the contractor be evaluating?*

Answer #9: For Task A, a Master Services Agreement (MSA) will be put in place that can be used in a flexible fashion to establish a scope of work for a program's general administration support before it is launched. The two near-term programs that would leverage the MSA are both in the buildings focus area: the FutureFit Heat Pump Water Heater and All-Electric Design Grant programs. However, the MSA is intended to be used for future programs that are not currently fully scoped, which could be in any one of the six program categories. The scope of Task B is exclusively for the "Innovation Onramp" program, which is one program within the Innovation area. For Task C, the selected consultant will be evaluating the entire programs portfolio (all six different program areas).

Question #10: *For the FutureFit Heat Pump Water Heater program, the RFP states, "Program includes data logging of the new water heaters for sharing in a customer-anonymized format." What type of data is being logged and at what interval?*

Answer #10: SVCE is open to either hourly or 15-minute interval data related to heat pump water heater draw in kilowatt hours (kWh). SVCE is looking for the data in a .csv format for use in matching with our other customer interval data. That data, minus customer identifiable information, will be shared in a raw format via our website to support future analyses of impact of demand response, time-of-use rates, or modeling for a heat pump water heater sales as a service.

Question #11: *The "FutureFit Your Home" program on the SVCE website only is only for residences. The FutureFit Heat Pump Water Heater program in the RFP only specifies "existing buildings". For Task C, should we assume that most (if not all) participants will be residential (not commercial)?*

Answer #11: For the FutureFit Your Home, those will indeed be residential customers. The All-Electric Showcase Grant program is open to both residential and non-residential customers. And, future programs will be launched to address residential and non-residential customers. For Task C, the Bidder can anticipate that participants will be residential and commercial.