



REQUEST FOR PROPOSALS

FOR

**DESIGN, IMPLEMENTATION, AND PORTFOLIO
MANAGEMENT SUPPORT FOR DECARBONIZATION
PROGRAMS**

RFP Release Date: June 16, 2023

**RFP Submittal Deadline: August 7, 2023 at 5pm Pacific
Time**

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2 Silicon Valley Clean Energy Overview

Silicon Valley Clean Energy (“SVCE”), a Community Choice Energy agency (“CCA”), is redefining the local electricity market and providing our residents and businesses with new clean energy choices—renewable and carbon-free electricity at competitive rates. SVCE was formed as a Joint Powers Authority in 2016, and now serves approximately 270,000 residential and commercial electricity customers across a service area comprised of the following thirteen communities: Campbell, Cupertino, Gilroy, Los Altos, Los Altos Hills, Los Gatos, Milpitas, Monte Sereno, Morgan Hill, Mountain View, Saratoga, Sunnyvale and Unincorporated Santa Clara County. 97% of electricity customers in SVCE’s service area receive their electricity from SVCE. For more information on SVCE, please visit: <https://www.svcleanenergy.org/>.

SVCE is advancing customer programs for fuel switching to clean, carbon-free electricity in the place of fossil fuels used in transportation, buildings, and infrastructure. Building on an estimated 29% reduction in community-wide greenhouse gas emissions in 2021 (from a 2015 baseline), SVCE is working with its member communities to extend these reductions to 40% by 2025 and 50% by 2030. For more information on SVCE’s programs, please visit: <https://svcleanenergy.org/offers-services/>.

3 RFP Overview

With this request for proposals (“RFP”), SVCE seeks information about the experience and qualifications of your organization (“Proposer”) as related to providing ongoing support to SVCE’s decarbonization programs as described in this RFP’s scope of work. Proposers should provide one proposal in response to this RFP and indicate the subject area to which they are responding, as defined in Section 16 High Level Scope of Work below (“Subject Area(s)”). Proposers are encouraged to apply for all sections of the scope for which they are qualified. SVCE reserves the right to award portions of the work to different Proposers, not award work for certain components, or to award work to no Proposers.

This RFP:

- Describes the scope of services sought by SVCE
- Outlines key dates and the proposed timeline
- Provides an opportunity for Proposers to describe their relevant qualifications and assets, and to explain how they could contribute
- Provides an opportunity for Proposers to identify any key topics or areas not identified in the RFP that would add substantial value to the scope of work

4 RFP Tentative Timeline

This tentative schedule is provided for the convenience of Proposers, but may be subject to change at any time by SVCE, in SVCE's sole discretion. Any such changes will be stated in an addendum to this RFP or otherwise communicated to Proposers.

Date (times in Pacific)	Event
June 16, 2023	RFP issued
July 11, 2023: 1-2pm	Pre-proposal teleconference
July 14, 2023: 5pm	Deadline for questions, clarifications (see below)
July 19, 2023: 5pm	Question responses posted online
August 7, 2023: 5pm	Deadline for Proposers to submit proposals
August 21, 2023: 5pm	Selected Proposers notified of interview times, if applicable
August 28 and 29, 2023: hold 10am-2pm both days	Possible interviews of selected Proposers
September 5, 2023	Anticipated date SVCE will notify awardees
September 5-29, 2023	Finalize contract details and timeline
October 5, 2023	Contract finalized (to be sent to Board for approval on October 11, 2023)
October 12, 2023	Project launch; work commences

Notes:

- Pre-Proposal Teleconference: A teleconference will be held on July 11, 2023 from 1-2pm Pacific Time. Call in information (Zoom): <https://svcleanenergy-org.zoom.us/j/81779624337?pwd=ZEM0WS9wL0hQclluNnE2MFhTTVRXUT09> Meeting ID: 817 7962 4337; Passcode: 674545.
- Questions: Proposers may submit questions concerning the RFP to solicitations@svcleanenergy.org. All questions and answers will be shared with all Proposers and will be posted in the same location as the RFP, at <https://www.svcleanenergy.org/solicitations/>. Questions must be emailed and received by SVCE no later than 5 p.m. on July 14, 2023. SVCE shall not be responsible for nor be bound by any oral instructions, interpretations or explanations issued by SVCE or its representatives.
- Proposal Review: SVCE may request clarifications of submitted proposals following submittal. Prompt responses will be requested.
- Proposer Interviews: SVCE may choose to conduct in-person/phone interviews of the selected Proposers on August 28 and 29, 2023, between 10am-2pm. Proposers are requested to ensure their team is available on both days.

5 Proposal Submittal

Proposals must be received on or before the above deadline and submitted by email to solicitations@svcleanenergy.org with the subject "Proposal - <Your Organization> - Decarbonization Program Support RFP".

Only electronic submittals in PDF format will be accepted.

What to submit:

- I. A narrative document (14 pages max if covering a single Subject Area; 20 pages max if covering both Subject Areas)
- II. A slide deck highlighting proposal elements (max. 20 slides, including cover slides, for a single Subject Area or both Subject Areas)

What the narrative document should include (14 pages max if covering a single Subject Area; 20 pages max if covering both Subject Areas), *submitted in this order only*):

1. Administrative Information (1/2 page)
 - Provide administrative information, and include at a minimum: name, mailing address, phone number, and email of designated point of contact.
2. Proposal summary (1 page)
 - Provide an overview of the core elements of your proposed solution. Identify any highlights, key features, and distinguishing points of the proposal.
3. Proposer description and qualifications (4 pages)
 - Provide an overview of your organization. Include overall organizational structure, number of employees, legal structure and ownership. Include information for all Proposers (and sub-contractors, if applicable) that are included in the proposal.
 - Describe resources and organizational structure with respect to this RFP. Provide a brief bio for key staff that will work on this project and highlight their credentials and role on this project.
 - Provide a brief description of your primary business model(s) related to this RFP.
 - Provide an overview of your previous experience on at least three similar or related projects. Include descriptions, costs, timeline and reference contact information.
 - Describe your specific experience and engagement in California and/or SVCE's service territory.
 - Provide a general description of Proposer's financial condition and identify any conditions (e.g., bankruptcy, pending litigation, planned office closures, impending merger) that may impede Proposer's ability to complete the scope of services. If Proposer has defaulted on a contract, provide details of the default and the resolution. if the Proposer has not defaulted on a contract, please state that.
4. Proposed solution (5 pages if covering a single subject area; 10 pages if covering both Subject Areas)
 - a. Clearly specify which Subject Area of this RFP you are responding to – see the Scope of Work in Section 16 of this RFP.
 - b. Describe your solution for the Subject Area(s) you are responding to.

If responding to Subject Area A, please answer the questions below in your solution:

- c. Explain your core tenets for successful program management. How will you help SVCE launch effective programs, adjust as we go, and help us meet our learning objectives in deploying these programs/approaches?
- d. Explain how you will handle scaling services for a given program or for the portfolio of programs as SVCE scales its offerings.
- e. Suggest innovative additions or modifications to the scope prepared by SVCE.
- f. From a program implementation perspective, describe what features might be important for the Subject Area B consultant to consider including in the Programs Portfolio Tool to improve customer interactions and manage programs data.

If responding to Subject Area B, please answer the questions below in your solution:

- g. Describe your work plan to implement a Salesforce or other brand customer relationship management (CRM) system to manage data for the full portfolio of SVCE's programs. SVCE prefers to use Salesforce CRM but is open to comparable solutions. Describe which brand CRM you recommend and why. Confirm that SVCE will hold the software license.
 - h. Describe how the Salesforce or other brand CRM will integrate with SVCE's own tools. Include a diagram or visual to illustrate interactions. Highlight skilled staff on the Proposer's team to implement the Salesforce or other brand CRM and to create workflows, dashboards, and reports for programs.
 - i. Given the importance of ensuring that the Programs Portfolio Tool is useful to the day-to-day program implementers, explain how your team will gather and incorporate feedback on the tool from the Subject Area A consultant. Briefly describe plans to train the Subject Area A consultant and SVCE staff on how to use the tool.
5. Proposed work plan and schedule (1 page) – see Exhibit C for format
- Present a well-conceived work plan. Include a sufficient description of each component. Show how the work plan would meet SVCE's schedule.
 - Illustrate how the work plan would proceed and what the key milestones or benchmarks would be, along with required levels of SVCE staff and stakeholder engagement.
 - Describe in the work plan how the Proposer's team plans to collaborate to address both Subject Areas A and B. Collaboration may be within the Proposer's team if responding to both Subject Areas, or with the selected consultant for the other Subject Area.
6. Cost proposal (2 pages) – see Exhibit D of this RFP for format

For both Subject Areas, please:

- **Include all costs** such as direct labor rates by position and year (for a 5-year contract); estimated hours for named project resources; subcontractor rates if applicable; and set up costs and ongoing fees for any software support to be paid by SVCE if applicable.
- Estimate other direct costs and reimbursable expenses, if any, and associated mark-up percentages, if any.

If responding to Subject Area B, please:

- Separately list the Salesforce or other brand CRM costs. SVCE prefers to use Salesforce CRM but is open to comparable solutions. Include implementation or set up fees, license fees, add-on licenses for additional staff, etc., and direct labor rates by position

and year; estimated hours for named project resources if applicable; and subcontractor rates if applicable.

- **For license fees**, include all costs annually: access fees, features, databases, security, sandboxes, and all other costs. Assume there are 12 SVCE users and 3 external administrator users. For any software, please confirm SVCE will be the owner of all data and licensing will be under SVCE.
 - **For implementation fees**, include: (a) how many hours are included at and what hourly rate. Include what hourly rate additional labor hours are billed at. Include the number of support hours included after implementation is complete, and the hourly rate of additional support hours if needed.
 - Indicate any pricing adjustment if another CCA implements a similar solution.
 - Be sure to separate out costs associated with integration with SVCE systems and data.
7. Confirmation of acceptance of contract terms or explanation of proposed contract modifications – see Section 7 of this RFP (as many pages as necessary)
- **List all exceptions or requested changes to SVCE’s standard contract (Exhibit A)** sought by the Proposer. Items not excepted here will not be open to later negotiation.
8. Inclusion of non-participating agencies (1/2 page)
- See Section 8 of this RFP.
 - Indicate Proposer’s willingness to extend the terms of resulting contracts to other similar entities.
9. Appendix (does not count towards page limit)
- Provide in the appendix, if available, current audited Financial Statements, credit rating reports from S&P Global Ratings and/or Fitch and/or Moody’s.
 - Provide a current client list.
 - Attach full resumes of key staff.
 - Any additional information.

What the slide deck should include (20 slides max for a single Subject Area or both Subject Areas):

- Consolidated summary of key elements and highlights from the narrative proposal.

6 Review and Selection Process

In addition to, or in reiteration of, the aforementioned minimum proposal requirements, all of which are mandatory, proposals will be evaluated based on the following non-exclusive list of criteria:

- Qualifications and experience of the Proposer providing similar products and services, including the capability and experience of key personnel as well as experience with other public and/or private agencies in similar capacities
- History of successfully performing services for public and/or private agencies and other CCAs
- Financial viability of the Proposer
- Cost to SVCE for the products and services identified in this RFP
- Proposed approach, including a clearly-demonstrated understanding of the intended scope of products and services to be provided
- Ability to meet any required timelines or other requirements
- Existence of and circumstances surrounding any claims or violations of law or governmental regulations against the Proposer, its representatives and/or partners
- Pertinent references
- Acceptance of SVCE's standard contract terms and conditions

SVCE reserves the right to consider factors other than those specified above and to request additional information from any/all Proposers as a part of the selection process.

7 Agreement Terms

Awardees will be required to enter into a contract ("Master Services Agreement" or "MSA") using SVCE's standard contract terms. Modification of the contract terms may be proposed by the Proposer for consideration by SVCE but are not guaranteed to be accepted. Rejection of the final terms from SVCE is grounds for disqualification.

SVCE's standard contract terms are available for review in Exhibit A.

8 Inclusion of Non-Participating Agencies

SVCE is asking all responding Proposers to indicate their willingness to extend the terms of resulting contracts, inclusive of price, to other interested California-based municipalities, municipally-owned utilities and CCAs. While this clause in no way commits these agencies to contract with SVCE's awarded consultant, nor does it guarantee any additional orders will result, it does allow other agencies, at their discretion, to make use of SVCE's competitive process (provided said process satisfies their own procurement guidelines) and enter into a contract directly with the awarded consultant. All contracts entered into by other agencies shall be understood to be transactions between that agency and the awarded consultant; SVCE shall not be responsible or liable in any manner for any such contracts.

9 California Public Records Act

All parties acknowledge that SVCE is a public agency subject to the requirements of the California Public Records Act, Cal. Gov. Code section 7920.000 et seq. ("CPRA"). SVCE will not disclose any part of any proposal before it announces a recommendation for an award, on the grounds that there is a substantial public interest in not disclosing proposal during the evaluation process. After the announcement of a recommended award, all proposals received in response to this RFP will be subject to public disclosure, with the exception of those elements in each proposal which are exempt from disclosure pursuant to the CPRA.

If a Proposer believes there are portion(s) of the proposal which are exempt from disclosure, the Proposer must plainly mark it as "Confidential", "Proprietary", or "Trade Secret." SVCE may also request that the Proposer state the specific provision of the CPRA which provides the exemption, and the factual basis for claiming the exemption. Any proposal which contains language purporting to render all or significant portions of the proposal as "Confidential," "Trade Secret," or "Proprietary," will be considered non-responsive and a public record in its entirety.

Although the CPRA recognizes that certain confidential trade secret information may be protected from disclosure, SVCE may not be in a position to establish that the information a Proposer submits is a trade secret. If a public records request is made for information marked "Confidential," "Proprietary," or "Trade Secret," SVCE will provide the Proposer(s) who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction. The Proposer shall be solely responsible for taking such legal steps; if the Proposer takes no such action after receiving notice of the public records request, SVCE will disclose all records it deems subject to disclosure, even if marked "Confidential," "Trade Secret," or "Proprietary."

10 Ex Parte Communication

Please note that to insure the proper and fair evaluation of a proposal, SVCE prohibits ex parte communication (i.e., unsolicited) initiated by the Proposer to an SVCE official or Employee evaluating or considering the proposals prior to the time a decision has been made. Communication between Proposer and SVCE will be initiated by the appropriate SVCE official or employee in order to obtain information or clarification needed to develop a proper and accurate evaluation of the proposal. Ex parte communication may be grounds for disqualifying the offending Proposer from consideration or award of the proposal, then in evaluation, or any future proposal.

11 Insurance Requirements

All insurance shall be secured from or countersigned by an agent or surety company recognized in good standing and authorized to do business in the State of California.

The Proposer shall, within thirty (30) days of notification of award and prior to commencement of work, take out and maintain in full force and effect minimum insurance coverage as specified in the attached requirements. This insurance shall remain in force and effect throughout the duration of the contract.

A certificate of existing insurance coverage should be submitted with the proposal as proof of insurability. If the current coverage does not meet the RFP requirements, then the Proposer should request an affidavit of insurability from the Proposer's insurance agent that certifies the requirements can and will be met. Failure to provide adequate insurance coverage may be cause for disqualification as non-responsive to the RFP requirements.

See Exhibit E for insurance requirements.

12 Conflict of Interest/Statement of Non-Collusion

All Proposers must disclose with their proposal the name of any officer, director, or agent who is also an officer or employee of SVCE. Further, all Proposers must disclose the name of any SVCE officer or employee who owns, directly or indirectly, an interest of five percent (5%) or more of the Proposer or any of its branches.

The Proposer shall certify that the Proposer, and any of its officers or employees have not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive assessment in connection with the proposal and that the Proposer is not financially interested in, or otherwise affiliated in a business way with any other Proposer.

13 Addenda

It is the Proposer's responsibility to contact SVCE prior to submitting a proposal to ascertain if any addenda have been issued, to obtain all such addenda and return executed addenda with the proposal.

The failure of a Proposer to submit acknowledgement of any addenda that affects the proposal price(s) may be considered an irregularity and may be cause for rejection of the proposal.

14 Certifications

The submission of a proposal shall be deemed a representation and certification by the Proposer that it:

- Has read, understands and agrees to the information and requirements set forth in this RFP.
- Has the capability to complete the responsibilities and obligations of the proposal being submitted
- Represents that all information contained in the proposal is true and correct
- Acknowledge that SVCE has the right to make any inquiry it deems appropriate to substantiate or supplement information supplied by Proposer, and Proposer hereby grants SVCE permission to make these inquiries
- Will provide any and all documentation related to the proposal in a timely manner
- Is eligible to submit a proposal because Proposer and any of its officers or employees are not presently debarred, suspended, proposed for debarment, declared ineligible,

or voluntarily excluded from participation in a transaction by any Federal, State, or local department or agency

15 Rights of SVCE

SVCE is not obligated to respond to any proposal submitted as part of the RFP. **SVCE at its sole discretion reserves the right to waive technicalities or irregularities, to reject any or all proposals, and/or to accept that proposal which is in the best interest of SVCE.** SVCE, in its sole discretion, reserves the right to select multiple Proposers or no Proposers at all, and/or reduce, change, or otherwise adjust the scope of work specified in this RFP. SVCE may at any time and for any reason decline to enter into a contract with any Proposer, terminate negotiations with any Proposer, or abandon the RFP. The award of this proposal, if made, may be based on considerations other than total cost and may be awarded based on various considerations, including without limitation; Proposer's experience and/or qualifications, past experience, administrative cost, standardization, technical evaluation and oral and/or written presentations as required. SVCE reserves the right to accept all or part, or to decline the whole, and to award this RFP to one (1) or more Proposers. There is no obligation to buy, to select a Proposer, or enter into a contract. The RFP, if awarded, will be in the judgment of SVCE the most responsive to the SVCE's needs. Each Proposer's costs related to the submission of a Proposal are entirely the responsibility of the Proposer, and SVCE shall have no responsibility or liability for such costs.

16 High Level Scope of Work

SVCE is now advancing programs for fuel switching to clean, carbon-free electricity in the place of fossil fuels used in transportation, buildings and infrastructure. Building on success in reducing greenhouse gas emissions (GHG) from the electricity supply compared to a 2015 baseline, SVCE has been working with its member communities to extend these reductions to 40% by 2025 and 50% by 2030. For more information on SVCE's overarching program strategy and planned programs, please visit: <https://www.svcleanenergy.org/programs/>.

SVCE's mission is to provide clean, carbon-free electricity at competitive rates, and to work with its member communities to reduce GHG emissions. One key avenue for this collaboration is through customer decarbonization programs. SVCE has developed several programs roadmaps/plans and been deploying programs since 2019.

Through this RFP, SVCE is seeking support from a third-party consultant to provide services for two Subject Areas:

- A. **Program administration support** in considering, designing, launching, running, refining/adjusting, scaling, and concluding new programs as outlined in its plans or added in coming years. Over time, the consultant may also take on the administration of existing SVCE programs. The consultant support will include general, strategic input on the program portfolio overall, reporting, and other relevant topics as identified by SVCE.
- B. **Software design and implementation support for a program portfolio management and data reporting system (hereafter referred to as the "Programs Portfolio Tool")** to standardize how programs are managed at SVCE, centralize information within one system, and track data through shared dashboards and reporting. The consultant would help migrate existing data into the new software, and

train SVCE staff and program implementers on how to use the software for program management and for viewing program enrollment and budget data. The software system will be licensed and owned by SVCE. SVCE will consider proposals for advisory and/or implementer services.

Proposers are invited to submit a proposal for one or both Subject Areas as they see fit. SVCE views Subject areas A and B as integrally related in that the Subject Area A consultant will provide input into the development of the Programs Portfolio Tool in Subject Area B. Once developed, the Subject Area A consultant will undergo training to learn how to use the Programs Portfolio Tool for effective program management. Similarly, the selected Subject Area B consultant will need to gain a high-level understanding of SVCE’s current and evolving program administration methods in order to design and implement a software system that is subsequently utilized to manage and report program data. SVCE expects that ongoing improvements will be made to the Programs Portfolio Tool in Subject Area B as programs scale and new programs come online in Subject Area A. As such, if distinct consultants are engaged to work on Subject Areas A and B, they will need to collaborate routinely during the contract term.

This work should occur on a time and materials basis, which will give SVCE the ability to scale up the support, as needed, and target it to specific areas of need for each program.

This RFP covers the general design, implementation, and management work of SVCE programs as well as development and ongoing maintenance of a software CRM system.

General Program Administration Consultant Responsibilities for Master Services Agreement

This RFP describes a set of tasks and sample subtasks that cover the broad “menu” of services that SVCE’s programs department may need. Over the term of the MSA, SVCE will work with the consultant to establish a scope of work (“Task Order”) for each project before it is launched. These Task Orders will use the menu of services, staff, rates, and acceptance of terms as agreed upon in the MSA. Program-related services will vary widely across decarbonization sectors and in terms of the level of detail and support needed. Each Task Order will be specific to the program or program-related project.

The following scope of work outlines the services that SVCE seeks on a menu of options in the MSA. The scope is divided into the two aforementioned subject areas:

A. Program administration

B. Software design and implementation support for the Programs Portfolio Tool

Subject Area A: Program Administration

This RFP is seeking a consultant able to work on a broad array of decarbonization topic areas. These include the built environment, mobility, grid integration, residential, and non-residential. In addition, SVCE plans to offer future rounds of its “Innovation Onramp” program to fund decarbonization pilots. Proposers should also address in their response experience with innovation/pilots including review of applications, technical analysis on viability/feasibility, selecting feasible projects, and managing those pilot programs.

A.1 Programs and Decarbonization Landscape Consideration: general support for SVCE in considering program concepts and understanding the decarbonization landscape. Sample subtasks:

- Assist SVCE in calculating metrics or synthesizing information about a sector of the market, program concepts, or SVCE's portfolio to inform strategic planning.
- Provide expertise and exploratory analysis to assist SVCE in understanding program-related concepts, opportunities, risks, and best practices.

A.2 Program Design and Launch/Implementation: comprehensive support for crafting processes, design decisions, and materials to successfully deploy SVCE's program to its customers. Sample subtasks:

- Work with SVCE to shape a final program design, based on any existing draft development work that SVCE staff has completed. May include defining project goals, requirements and restrictions.
- Integrate past experience with customer journeys into the program design process to ensure a customer-centric approach is used to develop effective and far-reaching programs. Engage customer focus groups or user groups as appropriate.
- Estimate required effort on behalf of consultant and SVCE. Outline key roles and responsibilities, and obtain SVCE sign-off on program-specific plans.
- Review budget and objectives to provide an estimate on cost-effectiveness and anticipated achievements of the program.
- Work with SVCE staff and SVCE's marketing consultant(s) to design an effective marketing campaign recognizing the importance of matching customers with competent providers.
- Work with SVCE staff and any evaluation-focused consultant under contract with SVCE to ensure program design will meet evaluation needs and lead to desired learning objectives.
- Implement and operationalize the program design. Develop any required materials, applications or other forms. Address any remaining gaps in the program design and fill in missing details to the level of granularity required to administer the program. Work with SVCE staff to publish necessary materials on the web and launch marketing campaigns.

A.3 Program Application Administration: deliver high-quality customer experience and efficiently process applications. Help SVCE track and understand pain points, customer journeys, and program progress in real time. Sample subtasks:

- Respond to applicant requests for clarification on requirements, help with application forms and application status through email and phone channels. Elevate for SVCE staff input as necessary, and only when necessary.

- Manage application processes. Review and approve, or deny and provide feedback, all applications based on eligibility, completeness and accuracy.
- Monitor any reservations in the system for compliance with program requirements. Process any additional paperwork upon completion of reservation terms and approve project. Remind applicants with reservations who have not completed their projects as they approach the end of their reservation window, and reject any that fail to meet the terms.
- Through the processes identified with SVCE staff, route approved projects for required rebate payment and other processing.

A.4 Ongoing Program Revisions and Tracking: make improvements to the program process, recommend program design improvements to SVCE staff, and keep track of all projects in the pipeline. Sample subtasks:

- Iterate and revise the program design and implementation, as necessary, throughout the life of the program, including incorporating customer feedback. Address any key issues that are discovered (e.g., gray area in program rules). Proactively identify these issues through actively considering the customer journey/experience and tracking the program results.
- Provide input into the design and selection of features for a comprehensive Programs Portfolio Tool (in Subject Area B) to easily monitor all data relating to the program. Be trained by tool developer in the utilization of this tool on a day-to-day basis to ensure effective program implementation.

A.5 Program Management: support SVCE staff overseeing the program to ensure it is operating efficiently, achieving goals, and supporting customers. Sample subtasks:

- Provide SVCE with periodic updates on the budget, including spent money, reserved funds and remaining funds. Updates should identify successes and failures, along with the impact that the program has had to date.
- Provide all additional reporting documentation required for compliance with the program funding sources.
- Provide SVCE with periodic updates on program achievements and progress towards state objectives and goals.
- As needed, design feedback surveys with SVCE staff and administer them to program participants.
- Establish clear parameters with SVCE staff regarding staff involvement. Operate independently to run ongoing programs, particularly incentive programs, with limited SVCE staff involvement, unless otherwise noted. Understand and mirror SVCE's perspective and tone in engagement with customers with limited ongoing SVCE staff involvement.

- Coordinate with SVCE’s third-party EM&V consultant to facilitate their review and evaluation of the program.

A.6 Miscellaneous Other Support: assist SVCE in its overarching decarbonization mission by providing expertise and assistance on other topics and in other relevant fields. Sample subtasks:

- On a time and materials basis, SVCE may require additional work outside the rest of the scope. Future programs will be unique and may require additional support. Program-adjacent activities (e.g., marketing, website design, distribution system issues, power supply topics) may also require support from the consultant.
- SVCE also believes that there may be additional, innovative work that the consultant could perform within this scope. Proposers are encouraged to outline key additions to this scope in the proposal. If SVCE missed any components the Proposer views as critical to the success of this program, please include them in the proposal as well.

Subject Area B: Software development and implementation support for the Programs Portfolio Tool

In addition to expertise in decarbonization, this RFP seeks a consultant to work with SVCE to design, develop, and implement a program portfolio management and data reporting system that is licensed by and owned by SVCE. There are approximately 25 programs across 6 categories currently being managed by 11 SVCE employees and 3 external vendors. There are multiple unique processes, sets of tools, and data files used to manage these programs. SVCE continues to add staff and programs so the complexity will continue to increase. The disparate systems lead to sub-optimal program data across SVCE’s portfolio and an inability to provide targeted program recommendations to customers. This will become an increasing issue particularly as programs begin to scale and reach significantly more customers.

SVCE’s goal is to leverage consultant expertise to design a Programs Portfolio Tool, which accomplishes the following goals:

1. Migrate off of old systems that won’t integrate efficiently or provide data to the new portfolio software
2. Improve our internal operations through automating repetitive or manual workflows (ex. emails, document sending, and payments)
3. Standardize how SVCE reports on program data (ex. number of applications, approved applications, enrolled, completed, and paid) to improve program insights
4. Centralize program budgeting data (ex. allocated budget, spent, remaining) to provide consistency across all individual programs, one source of truth, and allow for easier monthly/quarterly updates
5. Integrate with our existing systems, while providing maximum data and IT security
6. Include permissions functionality to provide limited access to external vendors

The following scope covers the general features, workflows, and system integrations required for the new portfolio management software. SVCE is also interested in additional ideas for additional features and workflows if the consultant believes it would add value to the goals outlined above.

SVCE prefers using Salesforce CRM because it has the most capability of CRM software providers we've looked at, has extensive third-party support, and peer Community Choice Aggregators in our industry have had success using it. SVCE is open to alternatives if the Proposer would like to propose other solutions, however.

Proposers are invited to include the software they think is most suitable for the job, whether it is a CRM, off-the-shelf solution, or custom solution. If proposing a custom solution, please submit prototypes, demos, or specs of what the custom solution is and why it is better than an off-the-shelf solution. The software system will be licensed and owned by SVCE.

SVCE will consider proposals for advisory and/or implementer services.

B1. Customer Application Submission and Review: Ability for a customer to submit a rebate or grant application online, for that application to populate in the software database and SVCE database, and for the SVCE team or external vendor to review and approve an application as part of an optimized, efficient workflow. Sample features to complete:

- Online form with dropdown menus for rebate and grant application that can be embedded into a webpage.
- Online form can be customized to fit SVCE's brand standards (color, typography, line weight).
- SVCE can update questions, answers, and logic in dropdown menus that are shown to customers on the online form.
- Allow customer to select multiple programs.
- Allow the customer to upload documents and photos.
- Populate database with form completion answers, documents, and photos.
- Populate dashboards and reports with stored data from form completion answers (Responsibility 5 and 6 below).
- Integrate with SVCE's own data warehouse.
- Ability to upload external datasets to populate dashboards and reports.

B2. Workflow Automations: Automate repetitive workflows currently performed by SVCE employees and external program administrators when managing an individual program including sending standard emails, agreements, and payments. Workflow automations will be built in the software licensed and owned by SVCE. Sample features:

- Automate emails when a customer reaches specific stages, examples: 1) once application is received send email to SVCE employee to review application, 2) if application is incomplete send email to customer to upload new documents, 3) once application is approved send welcome email to customer with next steps and agreement to execute via DocuSign.
- Include customer specific information such as name, email, etc. in automated emails.

- Create, customize, and save document templates that can be used for unique programs.
- Ability to modify saved template fonts and colors to conform with SVCE brand standards (color, typography, line weight).
- Automate payments of incentives and consultant invoices once an expense is approved by SVCE staff.
- Add or delete a program to the workflows as SVCE starts and stops individual programs.
- Integrate with existing SVCE systems (e.g., billing system).
- Ability to manage multiple programs with unique, separate data and reporting.

B3. Customer Interaction Notes and Database: Web-based customer database for internal SVCE employees and external administrators/vendors to store notes and follow up steps when customer interactions occur. Sample features:

- Save individual customer information to a unique record including: name, address, customer type, customer rate, house type, zip code, county, member agency (e.g., Cupertino or Sunnyvale), phone number, email address, program(s) applied for and completed, system installed per program, dollar value of incentive(s) received per program.
- Ability for customer record to progress from one stage to another when milestones are reached (e.g., payment is approved by SVCE employee, customer record progresses from Payment Approved to Payment Complete). Stages may include: Application Submitted, Application Complete, Application Approved, Job Completed, Payment Approved, Payment Complete.
- Integrates with automated workflows so SVCE employees and external administrators/vendors get email alerts when they need to complete an action for a customer.
- Ability to filter customer records using custom labels and view customer records by the filter selected (e.g., Affordable Housing).
- Ability to import and export data via API into chosen formats (e.g., CSV, XLSX).
- Ability to integrate with our existing data warehouse and data systems and automatically backup database daily or weekly.
- Ability to have two-factor authentication, integration with password manager, and additional high-security features.
- Customer interaction notes and database is accessible on a user-friendly webpage with ability to modify colors, fonts to conform with SVCE brand standards (color, typography, line weight).

- Flag duplicate applications for a given customer or address. This assists program administrators in identifying repeat applications or positive/negative patterns of that customer's engagement with SVCE programs.
- Integrate with existing and planned systems for tracking customer interactions (e.g., a system used by third-party SVCE vendor to manage billing system inquiries, and an upcoming system which is a concierge for general customer inquiries on how to electrify).

B4. External Vendor Permissions: SVCE works with several external vendors and administrators who we want to provide permissions to the system for. In so doing, the vendors can centralize some of their workflows in an SVCE maintained system, and SVCE and the external vendors will have one source of truth for program data, customer notes, etc. Sample features:

- Invite external vendors by email to access a workspace (e.g., dashboard, customer record, etc.).
- Allow the vendor to set up their own unique login with high security (e.g., 2FA and password manager).
- External vendors can view, input, and make changes to program information or data (e.g., customer email address, deal stage, etc.).
- Hide Admin-level privileged information (i.e., provide limited access to the vendor).
- Admin user (ex. SVCE) can view which vendors have been invited to set up accounts, and which ones have already set up accounts. Admin user can re-invite vendors who have not set up accounts yet.
- Historical tracking of which user types (e.g., Admin, Vendor) made changes to customer or program data.
- If an external vendor uses its own system for tracking customer applications/engagement, establish integration for two-way flow of data as needed (e.g., monthly uploads, daily pushes).

B5. Program Enrollment/Funnel Dashboards and Reports: SVCE staff and external administrators/vendors can view data-driven dashboards and reports to ensure a program is operating efficiently and achieving goals. Dashboards report on key metrics as defined by SVCE staff. Sample features:

- Charts and graphs shown on a webpage with number of customers in a program stage. Stages may include: Application Submitted, Application Complete, Application Approved, Enrolled, Job Completed, Payment Approved, Payment Complete.
- Ability to click into an individual customer record and read notes, dates, etc.
- Ability to create custom charts and graphs for data reporting on program enrollment statistics. Include ability to modify date ranges by month and year.

- Ability to view reports with additional key performance metrics: 1) impact (kWh, GHG), 2) average number of days to move between each stage for customers, 3) number of customers who have signed up for and completed multiple programs.
- Ability to create groups of selected individual programs and label a group with a unique name (e.g., Built Environment).
- Ability to track carbon emission impact (kWh, GHG) per customer, per program enrolled, using assumptions input by SVCE on carbon emission impact per program.
- Ability to set up filters by custom labels, ex. member agency (Cupertino, Sunnyvale, etc.), zip code, socioeconomic index (SEVI), utility account code, and affordable housing (yes/no).
- Integrates with automated workflows so SVCE employees or external administrators/vendors can get email alerts when milestones are reached (e.g., 1000 signups for Program XYZ).
- All reporting is accessible on a user-friendly webpage with ability to modify colors, fonts to conform with SVCE brand standards (color, typography, line weight).
- Ability to generate report updates automatically on a regular cadence cycle (e.g., monthly and weekly).
- Integrates with SVCE systems to pipe in relevant data and automatically backup database daily or weekly.

B6. Program Budget Dashboards and Reports: Create dashboards and reports with real-time budget data on individual programs and groups of programs so that SVCE staff can track how a program is performing against budget goals. Sample features:

- Charts and graphs shown on a webpage with how much an individual program has spent per expense category (e.g., Incentives, Consulting) versus the program budget.
- Ability to create custom charts and graphs for data reporting on program budget statistics. Include ability to modify date ranges by month and year.
- Ability to create groups of selected individual programs and label a group with a unique name (e.g., Built Environment).
- Ability to name charts/graphs and modify the scales of X and Y axes.
- Ability to view these statistics per Program, Category, Lead, and Manager: 1) Dollars allocated, 2) Dollars spent on incentives, 3) Dollars spent on consultants, 4) Dollars unallocated / unused, 5) Dollars remaining.
- Ability to create forecasted budgets over a defined time period (ex. 5-years) and put in new, revised budgets (e.g., 2x per year).
- Integrates with automated workflows so SVCE employees or external administrators/vendors can get email alerts when milestones are reached (e.g., 90% of Budget spent).

- All reporting is accessible on a user-friendly webpage with ability to modify colors, fonts to conform with SVCE brand standards (color, typography, line weight).
- Integrates with SVCE systems to pipe in relevant data and automatically backup database daily or weekly.
- Ability to generate report updates automatically on a regular cadence cycle (e.g., monthly and weekly).

Desired Qualities/Qualifications

In addition to the ability to carry out all tasks included in this scope, SVCE has high standards for how the consultant will engage with SVCE and customers. SVCE is seeking a partner who will proactively push SVCE's programs to be the best possible, identify opportunities that SVCE has missed, and will act as a multiplier to SVCE's staff. Sample qualities/qualifications include:

- Rapid responses and clear communications on needs, challenges, timelines, etc.
- Meets deadlines and communicates early when delays are inevitable, with suggested alternate paths forward.
- Depth and breadth of decarbonization industry and program expertise. Experience on comparable programs that can be leveraged to inform SVCE approaches. Flexible in applying past learning based on SVCE's desired approach.
- Extremely high-quality customer service when interfacing with SVCE customers. Ability to clearly understand, articulate, and emulate how SVCE presents itself to its customers.
- Very proactive and strong initiative.
- Easy to work with the entire team, but still efficient. Runs meetings effectively and stays on topic.
- Able to understand and follow SVCE's processes.
- Creative in proposing solutions to challenges.
- Manages sensitive customer data with appropriate confidentiality and responsibility (see Exhibit F for data confidentiality requirements).
- Stays flexible when adapting to new approaches and program-related technologies.
- Strong technical capabilities and past experiences designing, deploying and managing Salesforce CRM or comparable solutions for past clients for a similar purpose.
- Effectively collaborates within their own team and with other SVCE vendors to meet and advance program objectives.

Timing

SVCE expects to have this contract signed by October 2023. Task Orders will be able to be created for specific programs and work can begin. Task Orders will likely be established and signed throughout the following five years. The contract term is for five (5) years to allow work to be completed under those signed Task Orders.

Budget

For Subject Area A:

Provide a menu of services and describe how all tasks and subtasks sought by SVCE are addressed. Provide staff roles, rates, skills and all other requirements outlined in Section 5. SVCE anticipates spending up to \$4,000,000 on this contract over the 5-year contract term.

For Subject Area B:

Provide staff roles, rates, software costs, and all other requirements outlined in Section 5 of this RFP. Proposers are asked to provide their best pricing for set up, training, operating and maintaining the Programs Portfolio Tool over the five-year contract term.

Exhibit A: Standard Contract

AGREEMENT BETWEEN THE SILICON VALLEY CLEAN ENERGY AUTHORITY
AND
CLICK TO ENTER CONSULTANT'S NAME
FOR
CLICK TO ENTER SERVICES THAT WILL BE PROVIDED

THIS AGREEMENT ("Agreement"), is entered into this **Click here to enter DAY.** day of **ENTER MONTH., ENTER YEAR.,** by and between the SILICON VALLEY CLEAN ENERGY AUTHORITY, an independent public agency, ("Authority"), and **Click here to enter Consultant's name.,** a **Click here to enter entity type (California corporation, partnership, etc.).** whose address is **Click here to enter address.** (hereinafter referred to as "Consultant") (collectively referred to as the "Parties" and individually as a "Party").

RECITALS:

A. Authority is an independent public agency duly organized under the provisions of the Joint Exercise of Powers Act of the State of California (Government Code Section 6500 *et seq.*) ("Act") with the power to conduct its business and enter into agreements.

B. Consultant possesses the skill, experience, ability, background, certification and knowledge to provide the services described in this Agreement pursuant to the terms and conditions described herein.

C. Authority and Consultant desire to enter into an agreement for **Click here to enter a description of work to be performed.** upon the terms and conditions herein.

NOW, THEREFORE, the Parties mutually agree as follows:

1. **TERM**

The term of this Agreement shall commence on **Click here to enter beginning of term.,** and shall terminate on **Click here to enter end of term.,** unless terminated earlier as set forth herein.

2. **SERVICES TO BE PERFORMED**

Consultant shall perform each and every service set forth in Exhibit "A" pursuant to the schedule of performance set forth in Exhibit "B," both of which are attached hereto and incorporated herein by this reference.

3. **COMPENSATION TO CONSULTANT**

Consultant shall be compensated for services performed pursuant to this Agreement in a total amount not to exceed **Click here to enter amount of compensation in words.** dollars (**Click here to enter amount of compensation in numerals..00**) based on the rates and terms set forth in Exhibit "C," which is attached hereto and incorporated herein by this reference.

4. **TIME IS OF THE ESSENCE**

Consultant and Authority agree that time is of the essence regarding the performance of this Agreement.

5. **STANDARD OF CARE**

Consultant agrees to perform all services required by this Agreement in a manner commensurate with the prevailing standards of specially trained professionals in the San Francisco Bay Area under similar circumstances and in a manner reasonably satisfactory to Authority and agrees that all services shall be performed by qualified and experienced personnel. Consultant shall be responsible to Authority for any errors or omissions in the performance of work pursuant to this Agreement. Should any errors caused by Consultant be found in such services or products, Consultant shall correct the errors at no additional charge to Authority by redoing the professional work and/or revising the work product(s) called for in the Scope of Services to eliminate the errors. Should Consultant fail to make such correction in a reasonably timely manner, such correction may be made by Authority, and the cost thereof shall be charged to Consultant. In addition to all other available remedies, Authority may deduct the cost of such correction from any retention amount held by Authority or may withhold payment otherwise owed Consultant under this Agreement up to the amount of the cost of correction.

6. **INDEPENDENT PARTIES**

Authority and Consultant intend that the relationship between them created by this Agreement is that of an independent contractor. The manner and means of conducting the work are under the control of Consultant, except to the extent they are limited by statute, rule or regulation and the express terms of this Agreement. No civil service status or other right of employment will be acquired by virtue of Consultant's services. None of the benefits provided by Authority to its employees, including but not limited to, unemployment insurance, workers' compensation plans, vacation and sick leave are available from Authority to Consultant, its employees or agents. Deductions shall not be made for any state or federal taxes, FICA payments, PERS payments, or other purposes normally associated with an employer-employee relationship from any fees due Consultant. Payments of the above items, if required, are the responsibility of Consultant. Consultant shall indemnify and hold harmless Authority and its elected officials, officers, employees, servants, designated volunteers, and agents serving as independent contractors in the role of Authority officials, from any and all liability, damages, claims, costs and expenses of any nature to the extent arising from Consultant's personnel practices. Authority shall have the right to offset against the amount of any fees due to Consultant under this Agreement any amount due to Authority from Consultant as a result of Consultant's failure to promptly pay to Authority any reimbursement or indemnification arising under this section.

7. **NO RECOURSE AGAINST CONSTITUENT MEMBERS OF AUTHORITY**

Authority is organized as a Joint Powers Authority in accordance with the Joint Powers Act of the State of California (Government Code Section 6500 et seq.) pursuant to a Joint Powers Agreement dated March 31, 2016, and is a public entity separate from its constituent members. Authority shall solely be responsible for all debts, obligations and liabilities accruing and arising out of this Agreement. Consultant shall have no rights and shall not make any claims, take any actions or assert any remedies against any of Authority's constituent members in connection with

this Agreement.

8. NON-DISCRIMINATION

In the performance of this Agreement, Consultant, and any subconsultant under the Consultant, shall not discriminate against any employee, subcontractor or applicant for employment because of race, color, religious creed, sex, gender, gender identity, gender expression, marital status, national origin, ancestry, age, physical disability, mental disability, medical condition, genetic information, sexual orientation, military or veteran status, or other basis prohibited by law, except as provided in Government Code section 12940. Consultant shall have responsibility for compliance with this Section.

9. HOLD HARMLESS AND INDEMNIFICATION

A. **General Indemnification.** To the fullest extent permitted by law, Consultant shall, at its sole cost and expense, defend, hold harmless and indemnify Authority and its elected officials, officers, attorneys, agents, employees, designated volunteers, successors, assigns and those Authority agents serving as independent contractors in the role of Authority officials (collectively “Indemnitees”), from and against any and all damages, costs, expenses, liabilities, claims, demands, causes of action, proceedings, expenses, judgments, penalties, liens, and losses of any nature whatsoever, including fees of accountants, attorneys, or other professionals and all costs associated therewith and the payment of all consequential damages (collectively “Liabilities”), in law or equity, whether actual, alleged or threatened, which arise out of, are claimed to arise out of, pertain to, or relate to the acts or omissions of Consultant, its officers, agents, servants, employees, subcontractors, materialmen, consultants or their officers, agents, servants or employees (or any entity or individual that Consultant shall bear the legal liability thereof) in the performance of this Agreement, including the Indemnitees’ active or passive negligence, except for Liabilities arising from the sole negligence or willful misconduct of the Indemnitees as determined by court decision or by the agreement of the Parties. Consultant shall defend the Indemnitees in any action or actions filed in connection with any Liabilities with counsel of the Indemnitees’ choice, and shall pay all costs and expenses, including all attorneys’ fees and experts’ costs actually incurred in connection with such defense. Consultant shall reimburse the Indemnitees for any and all legal expenses and costs incurred by Indemnitees in connection therewith.

B. **Intellectual Property Indemnification.** Consultant hereby certifies that it owns, controls, or licenses and retains all right, title, and interest in and to any intellectual property it uses in relation to this Agreement, including the design, look, feel, features, source code, content, and other technology relating to any part of the services and including all related patents, inventions, trademarks, and copyrights, all applications therefor, and all trade names, service marks, know how, and trade secrets (collectively referred to as “IP Rights”), except as otherwise expressly provided by this Agreement. Consultant warrants that the services to be provided pursuant to this Agreement do not infringe, violate, trespass, or constitute the unauthorized use or misappropriation of any IP Rights of any third party. Consultant shall indemnify, defend, and hold Indemnitees, harmless from and against any Liabilities by a third party that the services to be provided pursuant to this Agreement infringe or violate any third-party’s IP Rights, provided any such right is enforceable in the United States. Such costs and expenses

- shall include reasonable attorneys' fees of counsel of Authority's choice, expert fees and all other costs and fees of litigation.
- C. The acceptance of the services by Authority shall not operate as a waiver of these rights of indemnification. The hold harmless and indemnification provisions of this Section shall apply regardless of whether or not any insurance policies are determined to be applicable to the Liability.
 - D. Consultant's indemnifications and obligations under this section shall survive the expiration or termination of this Agreement.

10. **INSURANCE**

- A. **General Requirements.** On or before the commencement of the term of this Agreement, Consultant shall furnish Authority with certificates showing the type, amount, class of operations covered, effective dates and dates of expiration of insurance coverage in compliance with the requirements listed in Exhibit "D," which is attached hereto and incorporated herein by this reference. Such insurance and certificates, which do not limit Consultant's indemnification obligations under this Agreement, shall also contain substantially the following statement: "Should any of the above insurance covered by this certificate be canceled or coverage reduced before the expiration date thereof, the insurer affording coverage shall provide thirty (30) days' advance written notice to the Authority by certified mail, Attention: Chief Executive Officer." Consultant shall maintain in force at all times during the performance of this Agreement all appropriate coverage of insurance required by this Agreement with an insurance company that is acceptable to Authority and licensed to do insurance business in the State of California. Endorsements naming the Authority as additional insured shall be submitted with the insurance certificates.
- B. **Subrogation Waiver.** Consultant agrees that in the event of loss due to any of the perils for which he/she has agreed to provide comprehensive general and automotive liability insurance, Consultant shall look solely to his/her/its insurance for recovery. Consultant hereby grants to Authority, on behalf of any insurer providing comprehensive general and automotive liability insurance to either Consultant or Authority with respect to the services of Consultant herein, a waiver of any right to subrogation which any such insurer of Consultant may acquire against Authority by virtue of the payment of any loss under such insurance.
- C. **Failure to Secure or Maintain Insurance.** If Consultant at any time during the term hereof should fail to secure or maintain the foregoing insurance, Authority shall be permitted to obtain such insurance in the Consultant's name or as an agent of the Consultant and shall be compensated by the Consultant for the costs of the insurance premiums at the maximum rate permitted by law and computed from the date written notice is received that the premiums have not been paid.
- D. **Additional Insured.** Authority, its members, officers, employees and volunteers shall be named as additional insureds under all insurance coverages, except any professional liability insurance, required by this Agreement. The naming of an additional insured shall not affect any recovery to which such additional insured would be entitled under this policy if not named as such additional insured. An additional insured named herein shall not be held liable for any premium, deductible portion of any loss, or expense of any nature on this policy or any extension thereof. Any other insurance held by an

additional insured shall not be required to contribute anything toward any loss or expense covered by the insurance provided by this policy.

- E. Sufficiency of Insurance. The insurance limits required by Authority are not represented as being sufficient to protect Consultant. Consultant is advised to confer with Consultant's insurance broker to determine adequate coverage for Consultant.
- F. Maximum Coverage and Limits. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum Insurance coverage requirements and/or limits shall be available to the additional insureds. Furthermore, the requirements for coverage and limits shall be the minimum coverage and limits specified in this Agreement, or the broader coverage and maximum limits of coverage of any insurance policy or proceeds available to the named insured, whichever is greater.

11. **CONFLICT OF INTEREST**

Consultant warrants that it, its officers, employees, associates and subcontractors, presently have no interest, and will not acquire any interest, direct or indirect, financial or otherwise, that would conflict in any way with the performance of this Agreement, and that it, its officers, employees, associates and subcontractors, will not employ any person having such an interest. Consultant and its officers, employees, associates and subcontractors, if any, shall comply with all conflict of interest statutes of the State of California applicable to Consultant's services under this Agreement, including the Political Reform Act (Gov. Code § 81000, et seq.) and Government Code Section 1090. During the term of this Agreement, Consultant may perform similar services for other clients, but Consultant and its officers, employees, associates and subcontractors shall not, without the Authority Representative's prior written approval, perform work for another person or entity for whom Consultant is not currently performing work that would require Consultant or one of its officers, employees, associates or subcontractors to abstain from a decision under this Agreement pursuant to a conflict of interest statute. Consultant shall incorporate a clause substantially similar to this section into any subcontract that Consultant executes in connection with the performance of this Agreement. Consultant understands that it may be required to fill out a conflict of interest form if the services provided under this Agreement require Consultant to make certain governmental decisions or serve in a staff Authority, as defined in Title 2, Division 6, Section 18700 of the California Code of Regulations.

12. **PROHIBITION AGAINST TRANSFERS**

Consultant shall not assign, sublease, hypothecate, or transfer this Agreement, or any interest therein, directly or indirectly, by operation of law or otherwise, without prior written consent of Authority. Any attempt to do so without such consent shall be null and void, and any assignee, sublessee, pledgee, or transferee shall acquire no right or interest by reason of such attempted assignment, hypothecation or transfer. However, claims for money by Consultant from Authority under this Agreement may be assigned to a bank, trust company or other financial institution without prior written consent. Written notice of such assignment shall be promptly furnished to Authority by Consultant.

The sale, assignment, transfer or other disposition of any of the issued and outstanding capital stock of Consultant, or of the interest of any general partner or joint venturer or syndicate member or cotenant, if Consultant is a partnership or joint venture or syndicate or cotenancy, which shall result in changing the control of Consultant, shall be construed as an assignment of this

Agreement. Control means fifty percent (50%) or more of the voting power of the corporation.

13. **SUBCONTRACTOR APPROVAL**

Unless prior written consent from Authority is obtained, only those persons and subcontractors whose names are attached to this Agreement shall be used in the performance of this Agreement.

In the event that Consultant employs subcontractors, such subcontractors shall be required to furnish proof of workers' compensation insurance and shall also be required to carry general, automobile and professional liability insurance in substantial conformity to the insurance carried by Consultant. In addition, any work or services subcontracted hereunder shall be subject to each provision of this Agreement.

Consultant agrees to include within their subcontract(s) with any and all subcontractors the same requirements and provisions of this Agreement, including the indemnity and insurance requirements, to the extent they apply to the scope of the subcontractor's work. Subcontractors hired by Consultant shall agree to be bound to Consultant and Authority in the same manner and to the same extent as Consultant is bound to Authority under this Agreement. Subcontractors shall agree to include these same provisions within any sub-subcontract. Consultant shall provide a copy of the Indemnity and Insurance provisions of this Agreement to any subcontractor. Consultant shall require all subcontractors to provide valid certificates of insurance and the required endorsements prior to commencement of any work and will provide proof of compliance to Authority.

14. **REPORTS**

- A. Each and every report, draft, work product, map, record and other document, hereinafter collectively referred to as "Report", reproduced, prepared or caused to be prepared by Consultant pursuant to or in connection with this Agreement, shall be the exclusive property of Authority. Consultant shall not copyright any Report required by this Agreement and shall execute appropriate documents to assign to Authority the copyright to Reports created pursuant to this Agreement. Any Report, information and data acquired or required by this Agreement shall become the property of Authority, and all publication rights are reserved to Authority. Consultant may retain a copy of any Report furnished to the Authority pursuant to this Agreement.
- B. All Reports prepared by Consultant may be used by Authority in execution or implementation of: (1) The original project for which Consultant was hired; (2) Completion of the original project by others; (3) Subsequent additions to the original project; and/or (4) Other Authority projects as Authority deems appropriate in its sole discretion.
- C. Consultant shall, at such time and in such form as Authority may require, furnish reports concerning the status of services required under this Agreement.
- D. All Reports shall also be provided in electronic format, both in the original file format (e.g., Microsoft Word) and in PDF format.
- E. No Report, information or other data given to or prepared or assembled by Consultant pursuant to this Agreement that has not been publicly released shall be made available to any individual or organization by Consultant without prior approval by Authority.
- F. Authority shall be the owner of and shall be entitled upon request to immediate possession of accurate reproducible copies of Reports or other pertinent data and

information gathered or computed by Consultant prior to termination of this Agreement or upon completion of the work pursuant to this Agreement.

15. **RECORDS**

Consultant shall maintain complete and accurate records with respect to costs, expenses, receipts and other such information required by Authority that relate to the performance of services under this Agreement, in sufficient detail to permit an evaluation of the services and costs. All such records shall be clearly identified and readily accessible. Consultant shall provide free access to such books and records to the representatives of Authority or its designees at all proper times, and gives Authority the right to examine and audit same, and to make transcripts therefrom as necessary, and to allow inspection of all work, data, documents, proceedings and activities related to this Agreement. Such records, together with supporting documents, shall be maintained for a minimum period of five (5) years after Consultant receives final payment from Authority for all services required under this agreement

16. **PARTY REPRESENTATIVES**

The Chief Executive Officer (“Authority Representative”) shall represent the Authority in all matters pertaining to the services to be performed under this Agreement. [Click here to enter the name of Consultant representative.](#) (Consultant Representative”) shall represent Consultant in all matters pertaining to the services to be performed under this Agreement.

17. **CONFIDENTIAL INFORMATION AND DOCUMENTS**

- A. Consultant covenants that all data, reports, documents, discussion, or other information (collectively “Data”) developed or received by Consultant or provided for performance of this Agreement are deemed confidential and shall not be disclosed or released by Consultant without prior written authorization by Authority. Authority shall grant such authorization if applicable law requires disclosure. Consultant, its officers, employees, agents, or subcontractors shall not without written authorization from the Authority Representative or unless requested in writing by the Authority’s General Counsel, voluntarily provide declarations, letters of support, testimony at depositions, response to interrogatories or other information concerning the work performed under this Agreement or relating to any project or property located within the Authority. Response to a subpoena or court order shall not be considered “voluntary,” provided Consultant gives Authority notice of such court order or subpoena.
- B. Consultant shall promptly notify Authority should Consultant, its officers, employees, agents or subcontractors be served with any summons, complaint, subpoena, notice of deposition, request for documents, interrogatories, request for admissions or other discovery request, court order or subpoena from any party regarding this Agreement and the work performed thereunder or with respect to any project or property located within the Authority. Authority may, but has no obligation to, represent Consultant or be present at any deposition, hearing or similar proceeding. Consultant agrees to cooperate fully with Authority and to provide Authority with the opportunity to review any response to discovery requests provided by Consultant. However, Authority’s right to review any such response does not imply or mean the right by Authority to control, direct or rewrite the response.
- C. It is understood that Authority is subject to the California Public Records Act (Gov.

Code § 7920.000 et seq.). If a request under the California Public Records Act is made to view any documents Consultant provided to Authority, Authority shall notify Consultant of the request and the date that such records will be released to the requester unless Consultant obtains a court order enjoining that disclosure. If Consultant fails to obtain a court order enjoining that disclosure, Authority will release the requested information on the date specified.

- D. In the event Authority gives Consultant written notice of a “litigation hold” or request under the Public Records Act, then as to all data identified in such notice or request, Consultant shall, at no additional cost to Authority, isolate and preserve all such data pending receipt of further direction from the Authority.
- E. Consultant agrees to comply with the confidentiality and data protection provisions set forth in Exhibit “E,” attached hereto and incorporated herein by this reference.
- F. Consultant’s covenants under this section shall survive the expiration or termination of this Agreement.

18. **NOTICES**

Any notice, consent, request, demand, bill, invoice, report or other communication required or permitted under this Agreement shall be in writing and conclusively deemed effective: (a) on personal delivery, (b) on confirmed delivery by courier service during Consultant’s and Authority’s regular business hours, or (c) three Business Days after deposit in the United States mail, by first class mail, postage prepaid, and addressed to the Party to be notified as set forth below:

TO AUTHORITY:
333 W. El Camino Real
Suite 330
Sunnyvale CA 94087
Attention: Chief Executive Officer

TO CONSULTANT:
[Click here to enter consultant name.](#)
[Click here to enter company name.](#)
[Click here to enter street number and street name.](#)
[Click here to enter city, state, and zip code.](#)

19. **TERMINATION**

In the event Consultant fails or refuses to perform any of the provisions hereof at the time and in the manner required hereunder, Consultant shall be deemed in default in the performance of this Agreement. If Consultant fails to cure the default within the time specified (which shall be determined by the Authority but shall be not less than 10 days) and according to the requirements set forth in Authority’s written notice of default, and in addition to any other remedy available to the Authority by law, the Authority Representative may terminate the Agreement by giving Consultant written notice thereof, which shall be effective immediately. The Authority Representative shall also have the option, at its sole discretion and without cause, of terminating this Agreement by giving seven (7) calendar days' prior written notice to Consultant as provided

herein. Upon receipt of any notice of termination, Consultant shall immediately discontinue performance.

In the event of Authority's termination of this Agreement due to no fault or failure of performance by Consultant, Authority shall pay Consultant for services satisfactorily performed up to the effective date of termination. Upon termination, Consultant shall immediately deliver to the Authority any and all copies of studies, sketches, drawings, computations, and other material or products, whether or not completed, prepared by Consultant or given to Consultant, in connection with this Agreement. Such materials shall become the property of Authority. Consultant shall have no other claim against Authority by reason of such termination, including any claim for compensation.

20. **COMPLIANCE WITH LAWS**

Consultant shall keep itself informed of all applicable federal, state and local laws, ordinances, codes, regulations and requirements which may, in any manner, affect those employed by it or in any way affect the performance of its services pursuant to this Agreement. Consultant shall, at all times, observe and comply with all such laws and regulations, including, but not limited to the Americans with Disabilities Act, the Stored Communications Act, 18 U.S.C. Section 2701, et seq., California Civil Code Sections 1798.80 through 1798.84, and the California Consumer Privacy Act, Civil Code Section 1798.100 *et seq.* Authority, and its officers and employees, shall not be liable at law or in equity by reason of the failure of the Consultant to comply with this paragraph.

Consultant represents and agrees that all personnel engaged by Consultant in performing services are and shall be fully qualified and are authorized or permitted under state and local law to perform such services. Consultant represents and warrants to Authority that it has all licenses, permits, certificates, qualifications, and approvals required by law to provide the services and work required to perform services under this Agreement, including a business license. Consultant further represents and warrants that it shall keep in effect all such licenses, permits, and other approvals during the term of this Agreement.

21. **CONFLICT OF LAW**

This Agreement shall be interpreted under, and enforced by the laws of the State of California. The Agreement and obligations of the Parties are subject to all valid laws, orders, rules, and regulations of the authorities having jurisdiction over this Agreement (or the successors of those authorities). Any suits brought pursuant to this Agreement shall be filed with the Superior Court of the County of Santa Clara, State of California.

22. **ADVERTISEMENT**

Consultant shall not post, exhibit, display or allow to be posted, exhibited, displayed any signs, advertising, show bills, lithographs, posters or cards of any kind pertaining to the services performed under this Agreement unless prior written approval has been secured from Authority to do otherwise.

23. **WAIVER**

A waiver by Authority of any breach of any term, covenant, or condition contained herein shall not be deemed to be a waiver of any subsequent breach of the same or any other term, covenant, or condition contained herein, whether of the same or a different character.

24. **INTEGRATED CONTRACT**

This Agreement represents the full and complete understanding of every kind or nature whatsoever between the Parties, and all preliminary negotiations and agreements of whatsoever kind or nature are merged herein. No verbal agreement or implied covenant shall be held to vary the provisions hereof. Any modification of this Agreement will be effective only by a written document signed by both Authority and Consultant.

25. **AUTHORITY**

The individual(s) executing this Agreement represent and warrant that they have the legal Authority and authority to do so on behalf of their respective legal entities.

26. **INSERTED PROVISIONS**

Each provision and clause required by law to be inserted into the Agreement shall be deemed to be enacted herein, and the Agreement shall be read and enforced as though each were included herein. If through mistake or otherwise, any such provision is not inserted or is not correctly inserted, the Agreement shall be amended to make such insertion on application by either Party.

27. **CAPTIONS AND TERMS**

The captions in this Agreement are for convenience only, are not a part of the Agreement and in no way affect, limit or amplify the terms or provisions of this Agreement.

28. **AUTHORITY'S RIGHTS TO EMPLOY OTHER CONSULTANTS**

Authority reserves the right to employ other consultants in connection with the subject matter of the Scope of Services.

29. **EXHIBITS**

The Exhibits referenced in this Agreement are attached hereto and incorporated herein by this reference as though set forth in full in the Agreement. If any inconsistency exists or arises between a provision of this Agreement and a provision of any exhibit, or between a provision of this Agreement and a provision of Consultant's proposal, the provisions of this Agreement shall control.

30. **FORCE MAJEURE**

Consultant shall not be liable for any failure to perform its obligations under this Agreement if Consultant presents acceptable evidence, in Authority's sole judgment, that such failure was due to acts of God, embargoes, inability to obtain labor or materials or reasonable substitutes for labor or materials, governmental restrictions, governmental regulations, governmental controls, judicial orders, enemy or hostile governmental action, civil commotion, fire or other casualty, or other causes beyond Consultant's reasonable control and not due to any act by Consultant.

31. **FINAL PAYMENT ACCEPTANCE CONSTITUTES RELEASE**

The acceptance by Consultant of the final payment made under this Agreement shall operate as and be a release of Authority from all claims and liabilities for compensation to

Consultant for anything done, furnished or relating to Consultant's work or services. Acceptance of payment shall be any negotiation of Authority's check or the failure to make a written extra compensation claim within ten calendar days of the receipt of that check. However, approval or payment by Authority shall not constitute, nor be deemed, a release of the responsibility and liability of Consultant, its employees, subcontractors and agents for the accuracy and competency of the information provided and/or work performed; nor shall such approval or payment be deemed to be an assumption of such responsibility or liability by Authority for any defect or error in the work prepared by Consultant, its employees, subcontractors and agents.

32. **ATTORNEY FEES**

In any litigation or other proceeding by which a Party seeks to enforce its rights under this Agreement (whether in contract, tort or both) or seeks a declaration of any rights or obligations under this Agreement, the prevailing Party shall be entitled to recover all attorneys' fees, experts' fees, and other costs actually incurred in connection with such litigation or other proceeding, in addition to all other relief to which that Party may be entitled.

33. **SEVERABILITY**

If any provision in this Agreement is held by a court of competent jurisdiction to be illegal, invalid, void, or unenforceable, the remaining provisions will nevertheless continue in full force without being impaired or invalidated in any way.

34. **SUCCESSORS AND ASSIGNS**

The terms and conditions of this Agreement shall be binding on the successors and assigns of the Parties to this Agreement.

35. **NO THIRD PARTY BENEFICIARIES INTENDED**

This Agreement is made solely for the benefit of the Parties to this Agreement and their respective successors and assigns, and no other person or entity may have or acquire a right by virtue of this Agreement.

36. **COUNTERPARTS; FACSIMILE/PDF/ELECTRONIC SIGNATURE**

This Agreement may be executed in multiple counterparts, all of which shall be deemed an original, and all of which will constitute one and the same instrument. The Parties agree that a facsimile, PDF or electronic signature may substitute for and have the same legal effect as the original signature.

37. **DRAFTING PARTY**

This Agreement shall be construed without regard to the Party that drafted it. Any ambiguity shall not be interpreted against either Party and shall, instead, be resolved in accordance with other applicable rules concerning the interpretation of contracts.

IN WITNESS WHEREOF, the Parties have caused the Agreement to be executed as of the date set forth above.

RECOMMENDED FOR APPROVAL

Enter Your Name, Enter Your Title

RECOMMENDED FOR APPROVAL

Amrit Singh, Chief Financial Officer/Director of Administrative Services

CONSULTANT NAME
Enter Consultant's Name

By: _____
Name: _____
Title: _____
Date: _____

SILICON VALLEY CLEAN ENERGY
AUTHORITY
A Joint Powers Authority

By: _____
Name: Girish Balachandran
Title: Chief Executive Officer
Date: _____

APPROVED AS TO FORM:

Counsel for Authority

ATTEST:

Authority Clerk

Exhibit B: Scope of Services

[Click here to enter text.](#)

Exhibit C: Schedule of Performance

Specify the schedule for design, development, and launch of the Programs Portfolio System in Subject Area B.

Do not use for Subject Area A.

[Click here to enter text.](#)

This schedule may be modified with the written approval of the Authority.

Task	Begin	Complete
1.		
2.		
3.		
4.		
5.		
6.		

Exhibit D: Compensation

Please submit a separate Exhibit C for each Subject Area.

Authority shall compensate Consultant for professional services in accordance with the terms and conditions of this Agreement based on the rates and compensation schedule set forth below. Compensation shall be calculated based on the hourly rates set forth below up to the not to exceed budget amount set forth below.

The compensation to be paid to Consultant under this Agreement for all services described in Exhibit “A” and reimbursable expenses shall not exceed a total of [Click here to enter dollar amount in words](#). dollars ([Click here to enter dollar amount in numerals](#).), as set forth below. Any work performed or expenses incurred for which payment would result in a total exceeding the maximum amount of compensation set forth herein shall be at no cost to Authority unless previously approved in writing by Authority.

Proposers are requested to review carefully the instructions for the cost proposal in Section 5 Part 6 of the RFP. Please use the tables below, or a similar format, to present your cost proposal.

Table 1. Hourly Labor Rates – to be completed for Subject Area A and B

Personnel	Title	Firm	Hourly Labor Rates				
			Year 1*	Year 2	Year 3	Year 4	Year 5

*Year 1 is the 12-month period from contract start date (expected October 2023).

Table 2. Costs by Task – to be completed for Subject Area B only

Task	Estimated Budget
1.	\$ XX,000
2.	\$ XX,000
3.	
4.	
5.	
6.	
Total	

Invoices

Monthly Invoicing: In order to request payment, Consultant shall submit monthly invoices to the Authority describing the services performed and the applicable charges (including a summary of the work performed during that period, personnel who performed the services, hours worked, task(s) for which work was performed). Authority shall pay all undisputed invoice amounts within thirty (30) calendar days after receipt up to the maximum compensation set forth herein. Authority does not pay interest on past due amounts.

Reimbursable Expenses

Administrative, overhead, secretarial time or overtime, word processing, photocopying, in house printing, insurance and other ordinary business expenses are included within the scope of payment for services and are not reimbursable expenses. Travel expenses must be authorized in advance in writing by Authority.

Additional Services

Consultant shall provide additional services outside of the services identified in Exhibit B only by advance written authorization from Authority Representative prior to commencement of any additional services. Consultant shall submit, at the Authority Representative's request, a detailed written proposal including a description of the scope of additional services, schedule, and proposed maximum compensation. Any changes mutually agreed upon by the Parties, and any increase or decrease in compensation, shall be incorporated by written amendments to this Agreement.

Exhibit E: Insurance Requirements and Proof of Insurance

Consultant shall maintain the following minimum insurance coverage:

A. **COVERAGE:**

- (1) **Workers' Compensation:**
Statutory coverage as required by the State of California.

- (2) **Liability:**
Commercial general liability coverage with minimum limits of \$1,000,000 per occurrence and \$2,000,000 aggregate for bodily injury and property damage.
ISO occurrence Form CG 0001 or equivalent is required.

- (3) **Automotive:**
Comprehensive automotive liability coverage with minimum limits of \$1,000,000 per accident for bodily injury and property damage. ISO Form CA 0001 or equivalent is required.

- (4) **Professional Liability**
Professional liability insurance which includes coverage for the professional acts, errors and omissions of Consultant in the amount of at least \$1,000,000.

- (5) **Privacy and Cybersecurity Liability**
Privacy and cybersecurity liability (including costs arising from data destruction, hacking or intentional breaches, crisis management activity related to data breaches, and legal claims for security breach, privacy violations, and notification costs of at least \$5,000,000 US per occurrence.

Exhibit F: Confidentiality and Data Security Requirements

Subject to the terms and conditions of the Agreement, current proprietary and confidential information of Authority regarding customers of Authority (“Authority Customers”) and/or other confidential information (collectively “Confidential Information”) may be disclosed to Consultant from time to time in connection herewith solely for the purposes set forth in the Agreement. Such disclosure is subject to the following legal continuing representations and warranties by Consultant:

1. The Confidential Information disclosed to Consultant in connection herewith may include, without limitation, the following information about Authority Customers: (a) names; (b) addresses; (c) telephone numbers and email addresses; (d) service agreement numbers and account numbers; (e) meter and other identification numbers; (f) Authority-designated account numbers; (g) electricity and gas usage (including monthly usage, monthly maximum demand, electrical or gas consumption, HP load, and other data detailing electricity or gas needs and patterns of usage); (h) billing information (including rate schedule, baseline zone, CARE participation, end use code (heat source) service voltage, medical baseline, meter cycle, bill cycle, balanced payment plan and other plans); (i) payment / deposit status; (j) number of units; and (k) other similar information specific to Authority Customers individually or in the aggregate. Confidential Information shall also include specifically any copies, drafts, revisions, analyses, summaries, extracts, memoranda, reports and other materials prepared by Consultant or its representatives that are derived from or based on Confidential Information disclosed by Authority, regardless of the form of media in which it is prepared, recorded or retained.
2. Except for electric and gas usage information provided to Consultant pursuant to this Agreement, Confidential Information does not include information that Consultant proves (a) was properly in the possession of Consultant at the time of disclosure; (b) is or becomes publicly known through no fault of Consultant, its employees or representatives; or (c) was independently developed by Consultant, its employees or representatives without access to any Confidential Information.
3. From the Effective Date, no portion of the Confidential Information may be disclosed, disseminated or appropriated by Consultant, or used for any purpose other than the purposes set forth in the Agreement.
4. Consultant shall, at all times and in perpetuity, keep the Confidential Information in the strictest confidence and shall take all reasonable measures to prevent unauthorized or improper disclosure or use of Confidential Information. Consultant shall implement and maintain reasonable security procedures and practices appropriate to the nature of the information, to protect the personal information from unauthorized access, destruction, use, modification, or disclosure and prohibits the use of the data for purposes not set forth in the Agreement. Specifically, Consultant shall restrict access to Confidential Information, and to materials prepared in connection therewith, to those employees or representatives of Consultant who have a “need to know” such Confidential Information in the course of their duties with respect to the Consultant program and who agree to be bound by the nondisclosure and confidentiality obligations of this Agreement. Prior to disclosing any Confidential Information to its employees or representatives, Consultant shall require such employees or representatives to whom Confidential Information is to be disclosed to review this Agreement and to agree to be bound by the terms of this Agreement. Consultant shall not disclose Confidential Information or otherwise make it available,

in any form or manner, to any other person or entity that is not Consultant's employee or representative (a "Third Party"), except where that Third Party has separately entered into a nondisclosure agreement with Authority. Without limiting Consultant's obligation of confidentiality as further described herein, Consultant shall be responsible for establishing, maintaining, and providing a written description to Authority of, a data privacy and information security program, including physical, technical, administrative, and organizational safeguards, that comply with or are substantial similar to the security controls identified in the current version of NIST SP800-53, and that is designed to: (a) ensure the security and confidentiality of the Authority's Data; (b) protect against any anticipated threats or hazards to the security or integrity of the Data; (c) protect against unauthorized disclosure, access to, or use of the Data; (d) ensure the proper disposal of Data; and, (e) ensure that all employees, agents, and subcontractors of Consultant, if any, comply with all of the foregoing. In no case shall the safeguards of Consultant's data privacy and information security program used to protect Data be less stringent than the safeguards used by Consultant for its own data. If the services include handling credit card information, then the Consultant shall comply at all times with all applicable Payment Card Industry Data Security Standards (PCI-DSS). Consultant agrees and warrants that it is responsible for the security of "cardholder data" that Consultant possesses, stores, processes or transmits on behalf of the Authority, and for any impact on the security of Authority's cardholder data environment adversely affected by any failure of Company to maintain compliance with provisions of the PCI-DSS applicable to the services. No less than annually, Consultant shall conduct a comprehensive independent third-party audit of its data privacy and information security program and provide such audit findings to Authority. The required audit shall be a SAS-70 (or successor standard) compliant audit, and Consultant shall provide the audit findings in the form of an SAS-70 Type II report.

5. Notwithstanding the above, Consultant may disclose Confidential Information to the extent required by an order, subpoena, or lawful process requiring the disclosure of such Confidential Information issued by a court or other governmental authority of competent jurisdiction, provided that Consultant notifies Authority immediately upon receipt thereof to allow Authority to seek protective treatment for such Confidential Information.
6. In the event of any act, error or omission, negligence, misconduct, or breach that permits any unauthorized access to, or that compromises or is suspected to compromise the security, confidentiality, or integrity of the Authority's Data or the physical, technical, administrative, or organizational safeguards put in place by Consultant that relate to the protection of the security, confidentiality, or integrity of the Data, Consultant shall, as applicable: (a) notify Authority as soon as practicable but no later than twenty-four (24) hours of becoming aware of such occurrence; (b) cooperate with Authority in investigating the occurrence, including making available all relevant records, logs, files, data reporting, and other materials required to comply with applicable law or as otherwise required by Authority; (c) in the case of Confidential Information, at Authority's sole election, (i) notify the affected individuals who comprise the Confidential Information as soon as practicable but no later than is required to comply with applicable law including, but not limited to, the provisions of California Civil Code Section 1798.82, or, in the absence of any legally required notification period, within five (5) calendar days of the occurrence; or, (ii) reimburse Authority for any costs in notifying the affected individuals; (d) in the case of Confidential Information, provide third-party credit and identity monitoring services to each of the affected individuals who comprise the Confidential Information for the period required to comply with applicable law, or, in the absence of any

legally required monitoring services, for no less than twelve (12) months following the date of notification to such individuals; (e) perform or take any other actions required to comply with applicable law as a result of the occurrence; (f) without limiting Consultant's obligations of indemnification as further described in this Agreement, indemnify, defend, and hold harmless Authority for any and all Claims (as defined herein), including reasonable attorneys' fees, costs, and expenses incidental thereto, which may be suffered by, accrued against, charged to, or recoverable from Authority in connection with the occurrence; (g) be responsible for recreating lost Data in the manner and on the schedule set by Authority without charge to Authority; (h) provide to Authority a detailed plan within ten (10) calendar days of the occurrence describing the measures Consultant will undertake to prevent a future occurrence and (i) upon conclusion of the occurrence, or at Authority's request, provide to Authority a comprehensive summary of the occurrence, including reason for occurrence, details of occurrence, how occurrence was addressed and any other information required by Authority, which shall be executed by Consultant and may be relied upon by Authority as a true and accurate account of the occurrence. Notification to affected individuals, as described above, shall comply with applicable law, be written in plain language, and contain, at a minimum: name and contact information of Consultant's representative; a description of the nature of the loss; a list of the types of data involved; the known or approximate date of the loss; how such loss may affect the affected individual; what steps Consultant has taken to protect the affected individual; what steps the affected individual can take to protect himself or herself; contact information for major credit card reporting agencies; and, information regarding the credit and identity monitoring services to be provided by Consultant. This Section shall survive the termination of this Agreement.

7. It shall be considered a material breach of this Agreement if Consultant engages in a pattern or practice of accessing, storing, using, or disclosing the Confidential Information in violation of the contractual obligations described herein. Consultant understands that if Authority finds that Consultant is engaged in a pattern or practice of accessing, storing, using, or disclosing Confidential Information in violation of this Agreement Authority shall promptly cease all disclosures of Confidential Information to Consultant. Consultant further understands that if Authority receives a customer complaint about Consultant's misuse of data or other violation of the Disclosure Provisions, Authority shall promptly cease disclosing that customer's information to Consultant and shall notify the California Public Utilities Commission of the complaint.
8. Consultant shall be liable for the actions of, or any disclosure or use by, its employees or representatives contrary to this Agreement; however, such liability shall not limit or prevent any actions by Authority directly against such employees or representatives for improper disclosure and/or use. In no event shall Consultant or its employees or representatives take any actions related to Confidential Information that are inconsistent with holding Confidential Information in strict confidence. Consultant shall immediately notify Authority in writing if it becomes aware of the possibility of any misuse or misappropriation of the Confidential Information by Consultant or any of its employees or representatives. However, nothing in this Agreement shall obligate the Authority to monitor or enforce the Consultant's compliance with the terms of this Agreement.
9. Consultant shall comply with the consumer protections concerning subsequent disclosure and use set forth in Attachment B to California Public Utilities Commission (CPUC) Decision No. 12-08-045.

10. In addition to any other requirements set forth in the Agreement, within ten (10) business days of receipt of Authority's written request, and at Authority's option, Consultant will either return to Authority all tangible Confidential Information, including but not limited to all electronic files, documentation, notes, plans, drawings, and copies thereof, or will provide Authority with written certification that all such tangible Confidential Information of Authority has been destroyed.
11. Consultant acknowledges that disclosure or misappropriation of any Confidential Information could cause irreparable harm to Authority and/or Authority Customers, the amount of which may be difficult to assess. Accordingly, Consultant hereby confirms that the Authority shall be entitled to apply to a court of competent jurisdiction or the California Public Utilities Commission for an injunction, specific performance or such other relief (without posting bond) as may be appropriate in the event of improper disclosure or misuse of its Confidential Information by Consultant or its employees or representatives. Such right shall, however, be construed to be in addition to any other remedies available to the Authority, in law or equity.
12. In addition to all other remedies, Consultant shall indemnify and hold harmless Authority, its officers, employees, or agents from and against and claims, actions, suits, liabilities, damages, losses, expenses and costs (including reasonable attorneys' fees, costs and disbursements) attributable to actions or non-actions of Consultant and/or its employees and/or its representatives in connection with the use or disclosure of Confidential Information.
13. When Consultant fully performs the purposes set forth in the Agreement, or if at any time Consultant ceases performance or Authority requires Consultant cease performance of the purposes set forth in the Agreement, Consultant shall promptly return or destroy (with written notice to Authority itemizing the materials destroyed) all Confidential Information then in its possession at the direction of Authority. Notwithstanding the foregoing, the nondisclosure obligations of this Agreement shall survive any termination of this Agreement.