

Questions and Response for SVCE's Electrification Concierge Services Consultant RFP

1. Is a recording of the pre-proposal webinar on April 17th available?

A. Yes, the webinar recording can be found on the SVCE solicitations page:

<https://svcleanenergy.org/solicitations/>

2. Would SVCE consider extending the deadline for proposal submittal one week to allow for more in-depth teaming conversations between firms?

A. Currently, SVCE is keeping the May 8th submission deadline. If changes to the RFP schedule are made, we will update our RFP posting on the solicitations page (<https://svcleanenergy.org/solicitations/>).

3. Can the current client list requested in the Organizational Description & Qualifications section be included as an appendix?

A. Basic client information that was requested in the RFP should be included in the 'Organization Description & Qualifications' section of the proposal for at least three similar or related projects. Additional information for additional projects can be included in the appendix.

4. Is year one considered a 12 month period or is does it encompass the period from August 28 to December of 2023?

A. One year is considered a 12-month period.

5. Does the contract end in December 2025?

A. The contract will end 3 years from the start date.

6. If our proposal focuses specifically on one technology, such as air-source heat pumps for space conditioning, should we still submit a proposal?

A. SVCE intends to select a proposer that can provide the concierge service and all supporting elements, including the technical assistance and electrification planning to support whole-home electrification, including, but not limited to water heating, space heating & cooling, and panel and service capacity.

7. We are a company with some past and ongoing projects to point to although much of that work was not billed. We saw the weightings of different criteria in section 6 of the RFP but wanted to verify that there wasn't any hard criteria that would serve as an automatic disqualifier.

A. No, SVCE will evaluate the proposals according to the rubric in section 6 of the RFP. We do not have any extensive requirements for previous billed experience.

8. Does SVCE anticipate that Electrification Plans be provided in multiple languages and if so, are any languages besides English and Spanish required?

A. SVCE will aim for electrification plans to be provided in English. However, for SVCE's consideration, proposers may distinguish costs to provide multi-lingual services, including Spanish translations for materials and online/phone customer service as an optional service.

9. Does SVCE maintain a list of customers designated as "income-qualified"?

A. Yes, SVCE has records of customers' CARE or FERA status. For other definitions of "income-qualified," SVCE would need to work with the concierge to develop verification processes.

10. Does the call center need to do day support on weekdays only or should it include night shifts and weekends too?

A. Details are to be finalized during contracting, but SVCE would like the call center to be available weekdays during business hours (9am-5pm PT) and at least one day per weekend. Night shifts are not expected.

11. Can you provide more details about the marketing and communications plan, what should it encompass and which goals or KPIs does it have?

A. We expect the proposer to develop a marketing & communications plan that helps raise awareness for the concierge service. The plan will be developed in close coordination with our marketing and outreach team. The proposer will offer goals and KPI options, and those will be selected and refined during the SVCE marketing team's reviews.

12. Will we get a customer "master file" to verify prospective customers?

A. Yes, SVCE will provide the Concierge vendor with the necessary customer data. Most likely, the Concierge will verify customer status through SVCE's DataHive platform.

13. Related to the marketing & outreach portion of the concierge scope of work, can you provide a clarification on the ratio that is devoted to support in-bound inquiries for people that are maybe already interested in electrification versus a campaign targeting people that may have never heard of electrification before?

A. SVCE has a marketing & outreach team that already has significant efforts to highlight our programs & resources for customers and general electrification awareness. Initially, we expect the concierge to support customers who are likely already sold on electrification and are looking to learn how to electrify. Eventually, for example in year 2, we expect broader marketing & outreach done by SVCE to bring in people that are less aware about electrification. However, this RFP's scope does not contemplate that the concierge consultant will solicit customers that are not otherwise considering electrification.

14. How does SVCE expect contractors to be involved in the program offerings? Do you have contractor preferences?

A. SVCE frequently receives customer inquiries on how to find contractors. We do not have a contractor network or contractual relationships with contractors. We do, however, collect information on contractors that completed rebated projects and we post that information online. Additionally, our eHub Solar + Storage Assistant platform connects customers with contractors, and our future direct install or turnkey programs referenced in the RFP are expected to have contractors pre-selected for those offerings.

15. Does SVCE have any requirements that could rule out RFP proposers to have relationships with contractors?

A. At this moment, we aren't aware of anything that could prevent proposers from having relationships with contractors. Any issues would be vetted with SVCE's legal team during contract negotiations. The concierge consultant will support single-family and small multi-family properties (4 or fewer units), where there are fewer requirements for contractors performing work.

16. Given the realized demand for the concierge is highly uncertain, could proposers submit a pay-per-service approach for the cost proposal submission? The proposer could estimate a base price and fee per inquiry that will scale with the volume of customers engaging with the concierge.

A. Yes, that's essentially what SVCE is looking for in Section 5 – Proposal Submittal, Item 6 (page 8 of the RFP). We provide a template for the budget, separating one-time costs versus ongoing operating costs, which will depend on the volume of customers engaging with the concierge. The ongoing operational costs should be based on the customer demand ('estimated customer interactions by year') that the proposer estimates based on their experience with other programs and on the proposer's capacity to provide concierge services.

17. Do SVCE or PCE have budget caps, either a total or annual numbers, to support this service?

A. Internally, SVCE has an estimate of the program budget but no dollar amount is included in the RFP. We will be looking at these proposals to understand what the concierge services will cost. Under Section 5 – Proposal Submittal, under Item 6 (page 8 of the RFP), we provide an initial year 1 estimate for the customer interest level ('estimated customer interactions'). We expect proposers to estimate the interest levels for years 2 and 3, based on their past experience and ability to scale services, and to then estimate the cost to provide the concierge services at that scale. We provided the template table in Item 6 to help us better compare costs across different proposals. However, proposers may structure their cost proposal differently, if desired.

18. What if a proposer earns revenue for their concierge services other than being compensated by SVCE – is that okay, not okay, or to be determined?

A. The concierge will be a free service for SVCE customers. We expect contracting to be more straightforward if no other parties or revenue streams are involved, but, at this point, we do not have any rules prohibiting bidders from having external revenue streams. SVCE will need to have a good understanding of such situations during selection and contract negotiations.

19. Does PG&E provide maps of cities with gas & electricity accounts and could that help with any door-to-door canvassing M&O efforts?

A. SVCE does have gas & electricity data for our customers, although not necessarily in map form. Mapping of customer accounts and door-to-door canvassing are not a part of the scope of this RFP.

20. Do you know how many customers are already fully electric?

A. SVC estimates that approximately 5% of single-family homes are already all-electric. That fraction is different and less certain for multi-family housing. Please look at our Buildings Baseline Study for more information: https://www.svcleanenergy.org/wp-content/uploads/2020/02/SVCE-Buildings-Baseline-Study_FINAL_share.pdf.