



Central Coast
**Community
Energy**

**REQUEST FOR QUALIFICATIONS
(RFQ) FOR
ONLINE COST OF SERVICE
CALCULATOR DEVELOPMENT AND
IMPLEMENTATION**

**RFQ RELEASE DATE: March 10, 2021
RESPONSE DEADLINE: 5:00 PM on March 24, 2021**

Table of Contents

1. General Information	3
1.1 3CE Overview.....	3
1.2 RFQ Documents	3
1.3 2021 3CE RFQ Website	3
1.4 RFQ Administrator	4
2. RFQ Overview	4
2.1 Online Cost of Service Calculator Development and Support	5
2.2 Response Pricing	5
2.3 Standard Service Agreement	5
3. RFQ Tentative Timeline	5
4. RFQ Questions	6
5. Review and Selection Process	6
5.1 Notification of Evaluation Results and Negotiations.....	6
6. Qualifications Package Requirements	7
6.1 Qualification Package Format	7
7. Inclusion of Non-Participating Agencies	7
8. Insurance Requirements	8
9. Conflict of Interest/Statement of Non-Collusion	8
10. Addenda	8
Appendix A: Scope of Work	9
Appendix B: Service Fees	11
Appendix C: Proforma Service Agreement	12
Appendix D: Reservation of Rights.....	13

1. General Information

1.1 3CE Overview

Central Coast Community Energy (3CE) is a public agency that sources competitively priced electricity from clean and renewable energy resources. 3CE is locally controlled and governed by board members who represent each community served by the agency. Revenue generated by 3CE stays local and helps keep electricity rates affordable for customers, while also funding innovative energy programs designed to lower greenhouse gas emissions and stimulate economic development. 3CE serves more than 400,000 customers throughout the Central Coast, including residential, commercial, and agricultural customers in communities located within Monterey, San Benito, San Luis Obispo, Santa Barbara and Santa Cruz counties. Learn more at 3CEnergy.org

1.2 RFQ Documents

This RFQ document consists of a Main Body and four (4) appendices. Among other things, the Main Body (i) offers general information pertaining to this RFQ, (ii) describes the purpose and drivers of this RFQ and provides high-level considerations for Vendors, (iii) includes a milestone schedule for this RFQ, (iv) sets forth terms governing the preparation and submission of qualifications and RFQ-related communications with 3CE, and (v) provides a high-level overview of the process for evaluating and selecting qualifications submitted in response to this RFQ. The appendices are as follows:

- Appendix A: Scope of Work
- Appendix B: Service Fees
- Appendix C: Proforma Service Agreement
- Appendix D: Reservation of Rights

Vendors are responsible for familiarizing themselves with and being fully aware of the terms of this RFQ, including the terms of each Appendix.

1.3 2021 3CE RFQ Website

The official website for this RFQ is <https://www.3CE.org/solicitations/>. This RFQ and related material and information are posted on the 2021 3CE RFQ Website and available for review. The 2021 3CE RFQ Website will be updated from time to time with additional information related to this RFQ. Interested Persons are responsible for monitoring the 2021 3CE RFQ Website to ensure the timely receipt of information about this RFQ.

1.4 RFQ Administrator

The RFQ Administrator for this RFQ is Lina Williams. The contact information for the RFQ Administrator is:

Lina Williams
RFQ Administrator
Central Coast Community Energy
70 Garden Ct, Ste 300
Monterey, CA 93490
Email: LWilliams@3CE.org

The RFQ Administrator’s responsibilities include (i) acting as a liaison between the Vendors in this RFQ and 3CE on all RFQ-related matters, (ii) ensuring that Vendor questions 3CE receives are responded to, in writing, and distributed to all interested Vendors, (iii) receiving, recording and maintaining Vendor qualifications, (iv) and managing other administrative matters relating to this RFQ.

As detailed in Section 4 below, all questions, requests, and other inquiries or communications from or on behalf of Vendors to 3CE about this RFQ must be directed in email to the RFQ Administrator. All questions and answers will be published for all RFQ Vendors. Vendors shall only rely on formal written revisited responses as set forth in Section 4.

2. RFQ Overview

With this request for qualifications (RFQ), 3CE seeks qualifications for the development of a web-based Cost of Service calculator (COSC) and ongoing Support Services (“Services”) to support customer communication and engagement, analytics, and energy programs management. The qualifications must highlight the experience and qualifications of your organization (Vendor) relating to the COSC structure and capabilities, implementation, and ongoing support as described in this RFQ’s scope of work. Vendors should provide qualifications in response to this RFQ. 3CE reserves the right to not award work to any Vendors. This RFQ:

- Outlines key dates and the proposed timeline
- Describes the scope of services sought by 3CE
- Provides an opportunity for Vendors to describe their relevant qualifications and assets, and to explain how they could contribute
- Provides an opportunity for Vendors to identify any key topics or areas not identified in the RFQ that would add substantial value to 3CE’s COSC and web-based customer experience

2.1 Online Cost of Service Calculator Development and Support

The selected Vendor will develop and implement an Online Customer Rate Calculator which can be hosted either on our own WordPress website (3CE.org) or housed on a separate web-platform which can connect to our website via a link (preferred method of implementation). The Online Customer Rate Calculator will allow customers and call-center representatives to see a comparison of the different Cost of Service (COS) rates customers are eligible for. Specifically, customers have an opportunity to compare a flat rate for electricity versus a variable rate of electricity based on specific time periods such as Peak, Part-Peak and Off-Peak know as Time-of Use (TOU) periods. Customers can elect to enrolled in the flat rate service offering by August 31, 2021 but after that, the flat rate will not be available. Customers will need to contact the call center or work with their appropriate 3CE representative to formally opt-in to the flat rate service offering. The rate calculator will need to compute using variables input by the customer to provide a yearly and monthly cost comparison of the rates a customer is eligible for. 3CE would also like the capability to test new rate variables for their commercial and agricultural customers.

2.2 Response Pricing

Vendors should provide a fixed price or not-to-exceed (NTE) for implementation costs and the ongoing applicable user costs associated for each Online Rate Calculator after implementation completes. The fixed implementation costs should include all phases from Business Analysis to Staff Training after deployment. The ongoing user license costs should also include technical support “Services” for the solutions.

2.3 Standard Service Agreement

3CE has posted our Standard Service Agreement on the RFQ website. Vendors are encouraged to review and provide a redline markup as part of the Qualifications Package.

3. RFQ Tentative Timeline

This tentative schedule is provided for the convenience of Vendors but may be subject to change at any time by 3CE. Any such changes will be stated in an addendum to this RFQ or otherwise communicated to Vendors.

Date	Event
March 10, 2021	RFQ issued
March 16, 2021, 5:00 pm PST	Deadline for questions, clarifications (see below)
March 18, 2021	Posting of Responses to Questions
March 24, 2021	Proposals Due
March 25-26, 2021	Possible interviews of top Vendors
March 30, 2021	Anticipated date 3CE will notify winning Vendor
April 6, 2021 or sooner	Contract Signed by 3CE and Vendor

4. RFQ Questions

Vendors and other interested parties are encouraged to submit questions concerning the RFQ to the RFQ Administrator (using the contact information provided above in Section 1.4). All questions must be submitted by email. Vendors are urged to submit RFQ questions to 3CE as early as possible, in consideration of the qualifications submission deadline.

Subject to 3CE's consideration of the confidentiality concerns, 3CE shall post all questions submitted by Vendors as well as 3CE's responses to those questions, on the 2021 3CE RFQ Website. All questions will be posted anonymously. 3CE's objective in posting questions and answers is to afford Vendors equal access to information potentially relevant to their qualifications. 3CE expects to provide answers only to questions posed on or before the March 19, 2021 deadline that are specific to an actual qualifications submission issue. Vendors shall not rely on any information, oral or written, that is not posted in accordance with this section.

5. Review and Selection Process

After the required Qualification Deadline, the RFQ evaluation will begin. The RFQ evaluation process consists of two (2) phases. During Phase I, 3CE will develop a ranking of qualifications based on the scoring matrix below. All the qualifications will be combined and reviewed based on economics, methodology, market experience, and other factors. Based on qualitative and quantitative assessments, qualifications will be assigned a final ranking.

Scoring Matrix

Category	Points
Price	30
Project approach and understanding of 3CE's objectives and requirements	25
CCA or Utility Customer References	10
Included Features	10
Timeline of Implementation	10
Completeness of Qualifications	10
Vendor located within 3CE's service area ¹ .	5
Total	100

In Phase II, 3CE expects to negotiate the final terms of a Service Agreement with the awarded Vendor. Vendors whose qualifications were not selected will be promptly notified and will have no subsequent participation in this RFQ. 3CE reserves the right to negotiate with all Vendors simultaneously.

¹ 3CE's service area includes: Counties of Monterey, San Benito, Santa Cruz and Santa Barbara and the cities of Capitola, Carmel, Gonzales, Greenfield, Hollister, Marina, Monterey, Morro Bay, Pacific Grove, Salinas, San Juan Bautista, San Luis Obispo, Sand City, Santa Cruz, Scotts Valley, Seaside, Soledad, Watsonville, Arroyo Grande, Del Ray Oaks, Grover Beach, Guadalupe, Paso Robles, Pismo Beach, Santa Maria, Solvang, Carpinteria, Goleta and Buellton.

5.1 Notification of Evaluation Results and Negotiations

After the completion of Phase I, the RFQ Administrator will communicate to each Vendor the status of its qualification(s) and whether additional discussions or negotiations are warranted.

6. Qualifications Package Requirements

The Qualifications Submission Process requires each Vendor to submit to 3CE a completed Qualifications Package, and responses to Appendix A, B, and C as applicable (collectively, the “Qualifications Package”), in order to have its qualification evaluated under this RFQ. Under the current schedule, the period during which a Vendor may submit a completed Qualification Package will end at 5:00 p.m. PST on March 24, 2021.

To submit qualifications, Vendors must deliver their completed Qualification Package to the RFQ Administrator, by the required deadline, as files attached to electronic mail. Qualification information that is not properly addressed to and not timely received by the RFQ Administrator will be considered undelivered. Qualifications failing to provide complete responses as required may be considered non-conforming. Vendors should not send, and the RFQ Administrator will not accept, paper copies of electronic qualifications.

Vendors will bear the risk of any failure of Vendor to submit the completed Qualification Package by the required deadline as required by this RFQ. This includes any failure of electronic delivery due to Vendor or 3CE’s systems. Qualifications for which Vendor does not submit all agreements, information, and material as required by this RFQ may be considered non-conforming and eliminated from consideration.

6.1 Qualification Package Format

Introduction and Executive Summary - Briefly describe the firm, its organization, and key personnel to be assigned to 3CE.

Description of Proposed Application and Services – Describe implementation services, scope of work, and other applicable provisions as specified in this RFQ.

Pricing for Services – Describe the proposed pricing for all requested services.

Financial, Technical, and Operational Qualifications – Demonstrate the firm’s financial viability, qualifications, and experience in providing the proposed services. Include supporting financial statements, references, project implementation timelines, sample reports, and other relevant information.

References – Share any written references or reviews of work from previous clients and/or share contact information with previous clients for 3CE to contact should the vendor be selected.

7. Inclusion of Non-Participating Agencies

3CE is asking all responding Vendors to indicate their willingness to extend the terms of resulting contracts, inclusive of price, to other interested California-based municipalities, municipally owned utilities, and community choice energy programs. While this clause in no way commits these agencies to contract with 3CE’s awarded consultant, nor does it guarantee any additional orders will result, it does

allow other agencies, at their discretion, to make use of 3CE'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; 3CE shall not be responsible or liable in any manner for any such contracts.

8. Insurance Requirements

All Vendor's 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 Vendor 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 qualification as proof of insurability. If the current coverage does not meet the RFQ requirements, then the Vendor should request an affidavit of insurability from the Vendor'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 RFQ requirements.

9. Conflict of Interest/Statement of Non-Collusion

All Vendors must disclose with their qualification the name of any officer, director, or agent who is also an employee of 3CE. Further, all Vendors must disclose the name of any 3CE employee who owns, directly or indirectly, an interest of five percent (5%) or more of the Vendor's firm or any of its branches.

The Vendor shall certify that he/she has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in connection with the qualification and that the Vendor is not financially interested in, or otherwise affiliated in a business way with any other Vendor on the same land or improvements.

10. Addenda

It is the Vendor's responsibility to contact 3CE prior to submitting a qualification to ascertain if any addenda have been issued, to obtain all such addenda and return executed addenda with the qualification. Vendor's proposals must affirmatively acknowledge receipt of ALL Addenda to be considered responsive.

Appendix A: Scope of Work

3CE is seeking a Web Developer to program and implement an Online Customer Rate Calculator and Support Services (“Services”) to support customer service, rate transparency and the transition to Cost of Service (COS) rates. The online applications should be built on a web-based platform that can be linked to our website or supported by our own WordPress website by on or before July 1st, 2021 and will be live for a period of 60 to 75 days through September 15, 2021. 3CE expects the Vendor to perform the related professional services (e.g. best practices guidance, training, project management, implementation, integration and report development) in a timely and professional manner. The desire is to allow 3CE customers, call center representatives and 3CE associates to use the online calculator to provide customers with a comparison of their eligible rates highlighting which would be most cost-effective for their energy use. Internal 3CE staff would also like to utilize the calculator to test potential new or future rates for our customers.

Below is a list of items to address in the pricing proposal. Additional items may be highlighted by vendor as experience and “Service” needs may vary. Please, separate pricing by each deliverable when submitting Vendor proposals.

Implementation Services

- Business Analysis and Requirements Gathering
- An intuitive interface and an easy learning curve to facilitate rapid adoption and minimize the need for external on-going training services
- Comprehensive library of standard reports and tools for end user ad-hoc reporting and queries
- A system that is stable, secure, accessible, and supports business processes, service delivery, and transparency
- Web Integration
- Train 3CE Staff
- Integration of the following variables to function accordingly and provide the COS comparison output. Please note that these variables are subject to change depending upon 3CE board approvals and are solely provided as an example to assist the vendor write a comprehensive proposal. Final rates will not be available until late June.:

The customer should be able to input:

- Customer type: agriculture, small-commercial, large-commercial, or residential
- Their rate schedule code: E1, E-TOU-C, A1X, A10, E-19 for example
- Monthly energy usage in Kilowatt Hour (kWh)
- The year their Service Agreement (SA) started
- Any discount program participation
- The season (Summer/Winter)
- Their zip code

Variables required on the back end to calculate output:

- Logic for what rates a customer qualifies for based on variable input

- Rate Cost charged per kWh
- Demand Cost charged per kWh
 - Varies by Time of Use Structure, there is a specific cost per time of use during peak, part-peak, and off-peak times.
- Power Charge Indifference Adjustment (PCIA) charged per kWh
 - Determined by year SA started
 - There are 4 potential groups of PCIA those whose account started in 2017 (group 1), 2018 (group 2), 2019 (group 3) or 2020 (group4).
 - PCIA is charged per kilowatt
- Franchise fee charged per kWh
 - Four potential rates determined like PCIA

Output:

- COS rates compared in graph form
- A monthly cost estimate and a yearly cost estimate for three years

Ongoing Services

- Technical Support
- Ongoing Support Strategy and PST Support Hours
- Training 3CE Staff of Feature Changes/Rollouts

Appendix B: Service Fees

All items included in the response to Appendix A: Scope of Work should be totaled into an all-inclusive, not to exceed price relative to Implementation Services as well as Ongoing Services. This cost should include all direct and indirect costs, including but not limited to annual fees, license fees, and seat costs. 3CE will not be responsible for expenses incurred in preparing and submitting the Technical Qualification or the Cost Qualification. Such costs shall not be included in the Cost Qualification.

Information should be provided listing similar engagements that the Vendor may have had with other entities of this type, performing similar tasks as required in this RFQ.

Appendix C: Proforma Service Agreement

Proforma Service Agreement

3CE is providing our Standard Service Agreement as a separate Word document on the 3CE Website, <https://www.3ce.org/solicitations/>. Please contact the RFQ Administrator if you have any questions.

Vendors are encouraged to review and provide redline comments as part of the Qualification Package.

Appendix D: Reservation of Rights

3CE expressly reserves the right at any time to:

- Waive any defect or informality in any response, qualification, or qualification procedure;
- Reject any or all responses;
- Reissue a Request for Qualification;
- Procure any service by any other means;
- Extend deadlines for accepting responses, or accept amendments to responses after expiration of deadlines; or
- Determine that no Project will be pursued.

Each of the foregoing rights (including any right listed in a series of rights) may be exercised individually by 3CE or any director, officer, employee, or authorized agent or representative of 3CE or its of their respective parent. The reservation of rights contained herein is in addition to all other rights reserved or granted to 3CE or any of its Affiliates elsewhere in this RFQ or otherwise held by or available to 3CE or any of its Affiliates.

No Warranties or Liabilities

BY PARTICIPATING IN THE RFQ PROCESS, EACH VENDOR AGREES THAT, EXCEPT TO THE EXTENT CONTAINED IN A SERVICE AGREEMENT WITH VENDOR:

ALL MATERIAL AND OTHER INFORMATION FURNISHED BY OR ON BEHALF OF 3CE OR ANY OTHER AFFILIATE OF 3CE IN CONNECTION WITH THIS RFQ IS PROVIDED WITHOUT ANY REPRESENTATION OR WARRANTY OF ANY KIND, INCLUDING, WITHOUT LIMITATION, ANY REPRESENTATION OR WARRANTY AS TO THE ACCURACY OR COMPLETENESS OF SUCH INFORMATION, AND

3CE, ITS AFFILIATES AND THEIR RESPECTIVE DIRECTORS, OFFICERS, MEMBERS, PARTNERS, EMPLOYEES, AGENTS, REPRESENTATIVES AND ADVISORS SHALL HAVE NO LIABILITY TO ANY VENDOR, ANY OF ITS AFFILIATES, OR ANY OF THEIR RESPECTIVE DIRECTORS, OFFICERS, MEMBERS, PARTNERS, EMPLOYEES, AGENTS, REPRESENTATIVES, ADVISORS, LENDERS, OR INVESTORS RELATING TO OR ARISING FROM THE USE OF OR RELIANCE UPON ANY SUCH INFORMATION, ANY ERROR OR OMISSION THEREIN, OR OTHERWISE IN CONNECTION WITH THIS RFQ.

Acceptance of Qualifications

Without prejudice to 3CE's rights under the Qualification Submission Agreement or at law or in equity, no qualification submitted by any Vendor shall be deemed accepted by, or otherwise binding upon, 3CE or any of its Affiliates and 3CE, its Affiliates and their respective directors, officers, members, employees, agents and representatives shall have no obligation or liability of any kind with respect to any such qualification or otherwise in connection with this RFQ, unless and until a Service Agreement has been mutually executed and delivered by 3CE or any of its Affiliates and Vendor, and then such obligation or liability shall exist only if and to the extent expressly set forth or provided for therein or in another signed, binding written agreement entered into by 3CE or any of its Affiliates and Vendor.

Notwithstanding anything to the contrary in this RFQ, all qualifications delivered to 3CE shall become the sole and exclusive property of 3CE upon receipt, and 3CE shall have all rights and privileges of ownership of such property, subject to any provision of this RFQ relating to confidentiality and any applicable confidentiality or other signed, binding written agreement between 3CE and Vendor executed in connection with this RFQ process.

Vendor Costs and Expenses

Each Vendor is solely responsible for all costs and expenses it incurs in connection with this RFQ. Through its participation in this RFQ, each Vendor agrees that under no circumstance, including, without limitation, 3CE's withdrawal from or suspension, cancellation, or termination of the RFQ process, will 3CE, any of its Affiliates or any of their respective directors, officers, members, partners, employees, agents, representatives or advisors have any responsibility or liability of any kind to Vendor, its Affiliates or any of their respective directors, officers, members, partners, trustees, employees, agents, representatives, advisors or lenders for any cost or expense directly or indirectly incurred by Vendor (no matter how incurred) in connection with the RFQ process. Nothing in this section shall be construed to limit the generality of the "No Warranties or Liabilities" section above.

Vendor Disclosure of RFQ Information

No Vendor may, without the prior consent of 3CE, disclose to any other Person (except 3CE staff) its participation in the RFQ process (other than by attendance at any meeting to which more than one vendor is invited by 3CE, which attendance in and of itself will not violate this provision of this RFQ) . Further, no Vendor may disclose, collaborate on or discuss with any other Person (except 3CE staff) bidding strategies or the substance of qualifications, including, without limitation, the price or any other terms or conditions of any contemplated, indicative or final qualification. Any such disclosure, collaboration or discussion would violate this RFQ and the Qualification Submission Agreement and may result in the rejection of Vendor's qualification or elimination of Vendor from further participation in this RFQ.

Confidential or Proprietary Vendor Information

All responses, inquiries, and correspondence related to this RFQ, or this RFQ process, as well as all other materials produced by Vendor that are submitted as part of the submittal will become the property of 3CE when received by 3CE and may be considered public information under applicable law. Any confidential or proprietary information in the submittal must be identified as such and marked “CONFIDENTIAL INFORMATION” OR “PROPRIETARY INFORMATION.” 3CE will not disclose confidential or proprietary information to the public, unless required by law; however, 3CE cannot guarantee that such information will be held confidential. As a California government entity, 3CE is subject to the California Public Records Act and other public transparency laws and, as such, cannot guarantee the confidentiality of information marked confidential or proprietary. 3CE will respond to requests for disclosure of records related to this RFQ in accord with applicable law on disclosure requirements and exemptions to disclosure. In the event 3CE is required to release confidential or proprietary information, it shall notify the affected Vendor such that the Vendor may attempt (if it chooses), at its sole cost to cause the requesting member of the public to treat such information in a confidential manner, and/or to prevent such information from being disclosed or otherwise becoming part of the public domain.

Vendor Acceptance of this Appendix D

By participating in the RFQ process, each Vendor agrees that it will be deemed to have accepted all the rights and terms included in this Appendix D and to have agreed that its participation in the RFQ is subject to such rights and terms. 3CE is conducting this RFQ and participating in the RFQ process in reliance upon the foregoing agreement.