

## **RFP: BayREN Multifamily Energy Efficiency and Financing Technical Assistance**

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*Answers to questions received by 8/17/2018*

### **General Questions**

- Q1: It's not clear to me whether these two RFP responses are separable - the TA and the financing assistance. Are you seeking one single RFP response or two separate responses - or are you open to either approach?
- A1: We are explicitly looking for two separate firms unless someone makes a good case otherwise. So we expect responses for one or the other.
- Q2: What is the anticipated contract length during which services will be provided? If the contract length is not a 12-month period, is the listed budget an annual amount or a total amount available for the contract term?
- A2: The contract length is anticipated to be 12 month, with potential for annual renewal. The budget amount is an annual amount.

### **Questions on Energy Efficiency Technical Assistance scope:**

- Q3: Is there a possibility of any Direct Install measures included in this RFP or program?
- A3: We are not requesting Direct Install measures. The BayREN Multifamily program design does not currently include nor intend to add a Direct Install component. However, if you believe this would be a strong addition and important to your proposed delivery model you may add it for consideration.
- Q4: Is it possible for a someone to win this BayREN Multifamily Technical Services bid and also participate in the PG&E Multifamily Upgrade Program?
- A4: Yes, though the participation would have to be structured in a way clearly delineates the activities and impacts of each program, and may be limited to projects outside of the BayREN region.

### **Questions on Financing Technical Assistance scope:**

- Q5: Can you please specifically define the term "Broker" ----is this a registered financial agent (e.g. Series 6, 7, 63, etc.), Realtor (i.e. real estate), or other type of Broker? What State registrations and/or licensing as a Broker are you requiring?
- A5: State of California Finance Lender and Broker. See DBO site:  
[http://www.dbo.ca.gov/Licensees/Finance\\_Lenders/Default.asp](http://www.dbo.ca.gov/Licensees/Finance_Lenders/Default.asp)

- Q6: The description of services for Financing Technical Assistance states that the, “Total budget for Financing Technical Assistance and Marketing is \$200,000.” Please identify the financing-related marketing, education, and outreach tasks that BayREN seeks through this RFP. If deliverables include production of hard-copy collateral or paid media engagement, please indicate whether the budget includes the associated direct costs for these deliverables.
- A6: The financing related ME&O tasks are expected be limited to direct lender outreach and targeted borrower recruitment and we expect to only consist of labor and travel (if any). If a respondent wishes to include other ME&O tasks, they should indicate them and include them in the budget.
- Q7: The Sample Fee Proposal in Appendix B appears to apply only to proposals for the Energy Efficiency Technical Assistance scope of work. Is there a preferred or required format for proposals for the Financing Technical Assistance scope of work?
- A7: We do not have a preferred or required format for proposals for the Financing Technical Assistance scope.