



Request for Qualifications for:

Bay Area Regional Energy Network (BayREN) Technical Services

Release Date: May 2, 2022

Proposals Due: June 3, 2022

I. About the Agency

StopWaste is a joint powers authority working on behalf of 17 member agencies in Alameda County and serving 1.7 million citizens. We are a public agency governed by the Alameda County Waste Management Authority, the Alameda County Source Reduction and Recycling Board, and the Energy Council. Since 1976, StopWaste has advanced the responsible use of resources through strong partnerships with local governments, businesses, and community organizations. We work to contribute to a healthy, thriving community that is resilient to climate change, driven by people who are empowered to use resources and energy in a way that is good for their communities, our local economy, and the planet.

At our core is a holistic approach that prevents waste and conserves energy while also advancing healthy environment, economic investments, climate action, inclusive communities, and water savings. Our wide-ranging services include technical assistance, grants and incentives, community engagement, public outreach campaigns, market development, and ordinance enforcement. We are directed by our long-term Aims of Capacity Building, Equity, Partnership, Regeneration, Mindset, and Evaluation (see descriptions at www.stopwaste.org)

II. Program Areas Seeking Funding

The Bay Area Regional Energy Network (BayREN) is a local government collaboration of the nine Bay Area counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma) who receive energy efficiency ratepayer funds from the PUC. BayREN has six programs, and StopWaste is the regional lead for two – Green Labeling and Bay Area Multifamily Building Enhancements (BAMBE) – and conducts local outreach in Alameda County for all six.

Green Labeling

StopWaste has developed and promoted building labeling systems to increase industry awareness and valuation of green homes. The Agency leads the BayREN Green Labeling program, which has an annual budget of approximately \$1.3 million. The primary objective of the program is to increase awareness and transparency of residential energy information, thereby being a driver of energy efficient investments that lead to energy savings in single-family homes.

In support of the State's urgent priority to improve the energy efficiency of existing buildings, BayREN's Green Labeling program trains real estate professionals so that they understand, market and evaluate energy efficient and green homes at the time of sale. The program also promotes the U.S. Department of Energy's (DOE's) Home Energy Score (HES) in an effort to make home energy assets transparent. This infrastructure within local communities encourages energy efficient investments at critical moments—the time of a home's sale, before a major renovation, or as a starting point to a homeowner's energy efficiency journey. Making these investments at this critical point in time will have a long-term effect on both the buildings and the larger community.

BAMBE

BayREN's multifamily energy efficiency program – Bay Area Multifamily Building Enhancements ("BAMBE") -- was designed to help multifamily property owners overcome barriers to addressing energy efficiency. StopWaste developed the program and has managed it on behalf of BayREN since 2013. The

program provides no-cost technical assistance, rebates, and support with financing options to encourage multifamily decision makers to make energy-saving and emissions-reducing upgrades.

BAMBE has an annual budget of close to \$7 million. Most of this funding goes directly to participants in the form of rebates and technical assistance. Since the program's inception, it has upgraded over 45,000 units, and provided technical assistance to many more.

Since 2020, the program has shifted from a more generalized outreach approach to prioritizing population and building ownership types that are underserved and disproportionately burdened, and those pursuing deep decarbonization through efficient electrification.

III. Description of Services Required

StopWaste seeks firms or individuals with expertise in green building practices, focusing on energy efficiency and electrification, to submit proposals to support the implementation of BayREN's Green Labeling and BAMBE programs. StopWaste staff will conduct overall project management and consultants will support StopWaste in providing technical services as described in the sections below.

Respondents may apply to one or more of the service categories (1-2 below) or tasks within a category (e.g., 2b). Firms and individuals interested in providing the services listed below should submit qualifications documenting their expertise and experience including specific requirements described under each service category and task and must demonstrate they comply with Part IV of this solicitation in order to be eligible for selection under this RFQ.

Category 1: Home Energy Score Data Collection and Infrastructure

StopWaste has been a DOE HES partner since 2015. The BayREN Green Labeling program, which promotes and supports the Bay Area HES program, launched in 2018. Given the more stringent energy code in California and the coordination with BayREN's Single Family rebate program, the Bay Area HES program has been utilizing a custom database and HES report. This has allowed the program flexibility to set custom recommendations appropriate for the Bay Area and to run innovative pilots, such as the Electrification Checklist addendum to the HES.

StopWaste seeks technical services that will improve data coordination among the HES program's implementation team by streamlining current data management among the program's related databases and websites. The Agency also wishes to optimize user interfaces utilized by the program's multiple stakeholders, including HES Assessors, program administrators, and BayREN county partners, for coordinating a dynamic program promoting energy efficiency transparency and decarbonization in the single-family residential sector.

For each of the topics below, we seek technical services to 1) streamline backend data management among multiple databases and data collection workflows to optimize data access for efficient program implementation and evaluation; and to 2) develop or improve user interfaces and experience.

1a. Data Infrastructure (backend) Integration: The HES Program currently coordinates program data among 4 databases/websites, 1) DOE's Home Energy Score report, 2) a custom database for processing HES assessments and rebates, 3) the Green Building Registry, and 4) the BayREN website. As the program has grown, there is an increased need for a data environment that provides a consistent format and workflow across data platforms. This task is to streamline HES program database management,

starting from the onsite data collection through producing reports for rebate processing and program evaluation. Specific subtasks include:

- Discovery of current database integrations and workflow to scope the opportunities for improving the efficient transfer, storage, and integration of data collection formats and reporting.
- Develop and maintain a database that is capable of tracking scores as they are submitted, reviewed, approved, and have rebates processed and connecting to the DOE's Home Energy Score report, as well as other interfaces such as the BayREN website and the Green Building Registry.
- Enable data fields and report customization to reflect modifications to HES pilot programs or other innovations in implementation, e.g., the Electrification Checklist specific to the BayREN region, and minimize the number of places/times Assessors must enter information.

1b. Users' Experience (UX) Optimization: Improvements are needed to increase the user-friendliness of the web and mobile interfaces utilized by HES Assessors and program administrators. This task is to improve or develop user interfaces to support ease of HES data collection, backend data coordination for program implementation, and data reporting. Specific subtasks include:

- Create an onsite data collection format (mobile-enabled) for HES Assessors to efficiently survey site data, review corrections, and submit reports to the HES program's database, as discussed in Task 1a above.
- Improve report interfaces for program administrators to review scores for corrections and rebate eligibility, as well as program rebate funds allocation and overall evaluation of current program objectives.
- Enable easy creation of customized reports by program administrators to dynamically access program data for evaluation, reporting, and program implementation.

Minimum Qualifications:

- Experience working with residential building labels, including the Department of Energy's Home Energy Score, or other energy efficiency programs.
- Development and maintenance of a data collection system and corresponding database used for in-field collection of home assets or energy information.
- Mobile app or interface development.
- User experience development and design.
- Preference for experience implementing programs in California.

Category 2: BAMBE

Collecting and managing data is a key part of the BAMBE program and ensures an optimal participant experience. Accurate and comprehensive data is also necessary to ensure the program is meeting its goals, measuring program impact, and recognizing opportunities for program modifications. Furthermore, the BAMBE program is regulated by the California Public Utilities Commission. As such, the data collection, maintenance, storage, privacy, and reporting requirements are subject to CPUC rules.

2a. Data Collection & Participant Engagement: Project participation will be tracked from initial inquiry through project completion in a database. Specific subtasks include:

- Subcontract with database service provider (currently Salesforce) to maintain and enhance project database.
- Collect data from leads needed to begin technical assistance. Refer ineligible leads to more appropriate programs. Update TA reporting and data tracking requirements. Collect data from TA teams needed for updating basic building information and input into Salesforce database for tracking and reporting; provide data entry support for reporting as needed.
- Review and revise program documents for the custom project review process and as requested.
- Provide participant analysis as directed by StopWaste staff.
- Assist with outreach as directed by Agency staff.

2b. Project-level Engagement & Review: Project-level data tracking should be reviewed for accuracy and provide a robust dataset for analyzing and improving the understanding of multi-family upgrade measures. The contractor will provide feedback and ideas for improving, refining, and evolving the program. Specific subtasks include:

- Perform desktop review for rebate reservation and rebate claim to make recommendations to Agency staff. Maintain all documentation for future reporting.
- Process interest forms and perform follow-up intake interviews, ensuring quality of leads. Collect data for leads needed to begin technical assistance
 - Ensure that converted leads meet eligibility criteria
 - Refer unfit leads to other programs

2c. Database System and Reporting Management: The contractor will maintain the program database and project information and ensure compliance with all regulatory reporting requests and data availability during regular reporting and for program evaluation. Specific subtasks include:

- Customize, update and refine program infrastructure including database tools and other information and communication system tools. Ensure the database contains all data points needed to comply with the custom project review process and CPUC reporting requirements/metrics. Perform intake for project leads, ensuring quality of leads.
- Provide support for necessary BayREN Multifamily Implementation Plan, work paper, EM&V development, and cost effectiveness calculator updates.
- Support development of Multifamily Implementation Plan, work papers, cost effectiveness calculator updates as required by Agency staff, BayREN, and CPUC.
- Oversee and help navigate regulatory compliance, reporting, and filings.
- Track program goals and overall status.
- Perform ongoing program performance analysis including Cost Effectiveness and Realization Rate.
- Generate regular reports as required by CPUC or requested by Agency staff. These can include monthly, quarterly, annual, and ad hoc reports. Provide annual program close out support.
- Implement custom project review process in coordination with Agency, the BAMBE TA provider and CPUC staff.
- Monthly invoicing and reporting.

Minimum Qualifications:

- Demonstrated experience working with multiple energy efficiency programs and familiarity with programs in the Bay Area.
- Expertise in California energy efficiency requirements, including Title-24 verification protocols and modeling software, as they apply to existing building additions, alterations and repairs.
- Knowledge of CPUC reporting and EM&V protocols and requirements.
- Experience conducting desktop quality assurance for a California Ratepayer funded program.
- Proven ability to perform data collection, management and storage for California energy efficiency programs.
- Experience providing excellent, responsive customer service.

IV. Submittal Requirements

Firms or individuals responding to this RFQ must provide:

- A. Description of the firm or individual proposing to provide services, including:
 - List of categories and tasks from Part III for which the firm/individual is seeking qualification and summary of qualifications for applicable categories.
 - Brief resumes for the primary contact and key personnel.
- B. For each category, provide three (3) examples of projects (or programs) that best demonstrate the individual or firm's expertise. If applying for multiple tasks within a category, only three examples are needed for the overall category. Examples may include work previously performed for StopWaste.
 - Describe the role of the individual or firm and key personnel.
 - Include outcomes and links to publicly available documentation where applicable (e.g., reports, case studies). Include additional materials as noted under each category.
 - Provide a client reference for each project including name, title, company, email and phone number.
- C. A professional fee schedule for the primary contact and the key personnel identified above who would be working on Agency projects.
- D. Signed copy of Appendix A: Required Contract Elements, including Insurance Requirements and Conflict of Interest. Unless specified in the submittals, the Agency will assume that the professional fee schedule will include any costs associated with complying with the Agency's insurance requirements as specified in Appendix A of this RFQ. The Agency will also assume that any work product developed as a result of contracting with Agency will become the property of Agency.

V. RFQ Process, Timeline, and Format

Release of RFQ	May 2, 2022
FAQ Webinar (will be recorded)	May 16, 2022 11:00AM PDT
Qualifications Due	June 3, 2022 5:00PM PDT
Short list Interviews (tentative, as needed)	June 13-17, 2022
Notification of Qualification:	June 24, 2022

Depending on the responses to this RFQ and the short list interview, the Agency may choose to contract with more than one firm or individual. Selected firms or individuals will be placed on a pre-qualified vendors list. Those included in this list are eligible to receive a bid request, RFP, or contract as services are needed. Should your services be needed, you will be contacted by staff to develop a scope of work and payment schedule for specific projects.

Questions can be directed to Emily Alvarez at evalvarez@stopwaste.org for Category A and Candis Mary-Dauphin at cmmary-dauphin@stopwaste.org for Category B. A webinar to answer questions will be held on May 16, 2022 at 11:00AM PDT and will be recorded and posted.

Submittal Format

The deadline for application submittal is **5:00 p.m., Friday, June 3, 2022**. Qualifications received after this time will **not** be accepted.

Qualifications must be submitted via email to RFQ@StopWaste.org with the subject line clearly marked "**BayREN RFQ.**" Upon submittal, you will receive an automatic confirmation of receipt. If you do not receive this confirmation, please contact Holly Mayne (hmayne@stopwaste.org).

General Conditions

Contracts for services will be between the consultant and the Energy Council. All materials submitted become the property of the Energy Council and will not be returned. Funds awarded are public funds and any information submitted or generated is subject to public disclosure requirements. Respondents bear all costs associated with responding to this RFP, and the Energy Council will provide no compensation for these costs.

The Energy Council reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to request modifications of the proposal, to accept or reject any or all proposals received, to award full or partial funding of any request, and/or to cancel all or part of this RFQ at any time prior to awards.

VI. Attachments

Appendix A: Required Contract Elements

Attachment A - Required Contract Elements

Professional Services Agreement including Insurance Requirements and Statement of Economic Interest

It is a requirement of StopWaste that any individual or firm selected to provide professional consulting services must be able to comply with the terms of our professional services agreement (attached), which includes the following insurance requirements:

- A. **Comprehensive general liability insurance:** Insurance Services Office Form CG 00 01 covering CGL on an "occurrence" basis including products and completed operations, personal & advertising injury liability, blanket contractual liability, and broad-form property damage liability coverage. The combined single limit for bodily injury and property damage shall be at least \$2,000,000. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.
- B. **Automobile Liability:** ISO Form Number CA 00 01 covering any auto (Code 1), bodily injury and property damage liability insurance covering owned, non-owned (Code 9), rented, and hired (Code 8) cars. The combined single limit for bodily injury and property damage shall at least \$1,000,000.
- C. **Statutory workers' compensation and employer's liability insurance** as required by state law with a limit of at least \$1,000,000 per accident for bodily injury or disease. Neither Contractor nor its carrier shall be entitled to recover any costs, settlements, or expenses of workers' compensation claims arising out of this agreement. The Employer's Liability policy shall be endorsed to waive any right of subrogation against the Agency, its employees or agents.
- D. **Professional Errors and Omissions Liability Insurance.** The limit of liability shall be at least \$1,000,000. If the policy is written on a "claims made" basis, Contractor must maintain required coverage for a period of three years after the expiration of this agreement. Contractor may satisfy this requirement by renewal of existing coverage or purchase of either prior acts or tail coverage applicable to said three-year period.

In addition, the individual or firm's project manager may be required to submit a Statement of Economic Interest Form (Form 700) as required by the State Fair Political Practices Commission. For a copy of a Form 700, please see the California Fair Political Practices Commission website at <http://www.fppc.ca.gov>

Please sign the statement below to indicate that you and your firm understands and will comply with the terms of the Authority's professional services agreement including the required insurance policies and will submit a Statement of Economic Interest Form if requested by Authority staff.

I have reviewed and will comply with the terms of the Authority's professional services agreement and certify that my firm has the ability to obtain the required insurance policies and submit the Statement of Economic Interest Form.

I understand that failure to comply with any of these requirements will result in the Agency's refusal to enter into a contract for services with my firm.

Name: _____

Title: _____

Firm: _____

Signature: _____

Date: _____