



*A Department of the City of Alameda*

**REQUEST FOR PROPOSAL  
PS 08-14-05  
Direct Install  
Commercial Lighting Retrofit Program**

Make all inquiries and send all questions to:

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Proposal Submission Deadline:

**Thursday September 11th, 2014 – 3:00 PM PT**

Alameda Municipal Power

2000 Grand Street

Alameda, CA 94501

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## 1.0 RFP Purpose

The purpose of this RFP is to obtain a Program Administrator to provide Alameda Municipal Power (AMP) with a direct install Commercial Lighting Retrofit Program (Program). The intent is for the Program Administrator (PA) to create and implement a direct install, comprehensive, turnkey approach to commercial lighting retrofits that delivers cost-effective, reliable energy savings and rebates to customers and that supports AMP GHG emissions reduction efforts. The program will be a “one stop shop” program that will provide a seamless customer experience from audit to installation to rebate and will be offered to all AMP commercial customers. The PA will implement and manage the Program, and any required subcontractors on behalf of AMP.

This program is focused on removing the barriers to AMP commercial customers to complete lighting retrofits. The barriers are knowledge of energy efficient lighting technologies – particularly LEDs, high costs, ability and time to hire a qualified lighting installer, and the added cost of complying with the new CA State Building Energy Code, Title 24. Under a direct install program, the PA will market the program, conduct lighting audits that will include project design and specifications, encourage the customer to complete the retrofit, take care of all Title 24 compliance, and refer the customer to PA-approved subcontractors to complete the lighting retrofit. Additionally the PA will provide oversight and inspection of all retrofits, take responsibility for Title 24 compliance, processing and payment of rebates, and program tracking and reporting.

## 2.0 Utility Background

Alameda Municipal Power, a department of the City of Alameda, is a municipal utility that provides safe, cost-effective, reliable and environmentally responsible, electric-energy services since its founding in 1887. AMP is a member of the Northern California Power Agency (NCPA), a joint-powers agency composed of AMP and 16 other Northern California public entities. AMP is the oldest municipal utility in California and is amongst the oldest in the nation, either public or private. AMP employs approximately 90 employees.

AMP is governed by a Public Utilities Board (PUB). In accordance with the City Charter, the Board is comprised of four commissioners and the city manager. The Board establishes goals and policies, approves major purchases, and creates the framework for local control of AMP. AMP's current supply mix provides customers with energy that exceeds California's requirements for clean energy, which includes geothermal, wind, large and small hydro, and landfill gas generation. NCPA, through the direction of AMP, manages AMP's power resources and AMP serves as the distribution agent.

AMP is a full service electric utility that provides electricity to all residential, commercial, and industrial customers within the City of Alameda. AMP is a winter peaking utility with an average residential bill of \$54. AMP's average residential customer usage is about 400 kWh per month and over 50 percent of AMP's residential customer base is renters. Over 60% of AMP's revenue comes from commercial use. For fiscal year 2013 the total energy sales for AMP was 363,444 megawatt-hours (MWh) and the peak demand was 57.7 megawatts.

As a city department, AMP is a nonprofit organization and exists solely for the benefit of its customers. AMP takes pride in its reliability, renewable power portfolio and customer-centric focus.

AMP's current environment is summarized as follows:

<b>Area</b>	10.8 Square Miles
<b>Population</b>	~75,000
<b>Number of Meters</b>	~34,400
<b>Residential Customers</b>	~30,300
<b>Commercial and Industrial</b>	~4,100

In 2008 the City of Alameda City Council approved the “Local Action Plan for Climate Protection” and a greenhouse gas emissions (GHG) target of reducing emissions by 25% by 2020 using 2005 as the base year. AMP as a department of the City of Alameda was instrumental in creating the report and supports the GHG reduction target.

AMP provides energy efficiency programs and services to all customers including free energy audits, prescriptive and customized rebates, public awareness programs, and advanced technologies. Since 1991, AMP has spent more than \$3.3 million on direct customer rebates and customers have reduced their energy use by 33,597 MWh/yr and their demand by 10.3 MW. Pre- and post-installation inspections are done on 100 percent of the commercial rebates to ensure reliable savings.

Additional information about AMP can be found at [www.alamedamp.com](http://www.alamedamp.com).

## 3.0 Scope of Services and Funding

The Scope of Services includes the Program Goals, Program Description, Program Funding and Timeline of the Direct Install Commercial Lighting Retrofit Program.

The program budget is expected to be \$600,000. Note the program amounts will cover incentives as well as program administration.

### 3.1 Program Goals

The program goals are as follows:

- Create and implement a direct install, turnkey successful, commercial lighting retrofit program
- The net energy savings must meet or exceed 1,500 MWh/yr
- The results of the program total resource cost test must be greater than 1.0
- The utility levelized cost over the lifetime of the program must be less than \$0.06/kWh
- The program must have a high participant satisfaction rate
- The program must be made visible to the community of Alameda
- The program tracking and reporting data must easily and reliably upload to the E3 tool and the energyOrbit database.

## 3.2 Program Description

The objective of the program is to create and implement a direct install commercial lighting retrofit program that will be cost effective, provide benefit to AMP ratepayers, and support AMP GHG emissions reduction efforts. The program will be a “one stop shop” for all commercial customers that will provide a seamless customer experience from audit to installation to rebate. The Program Administrator (PA) will provide all necessary services including but not limited to:

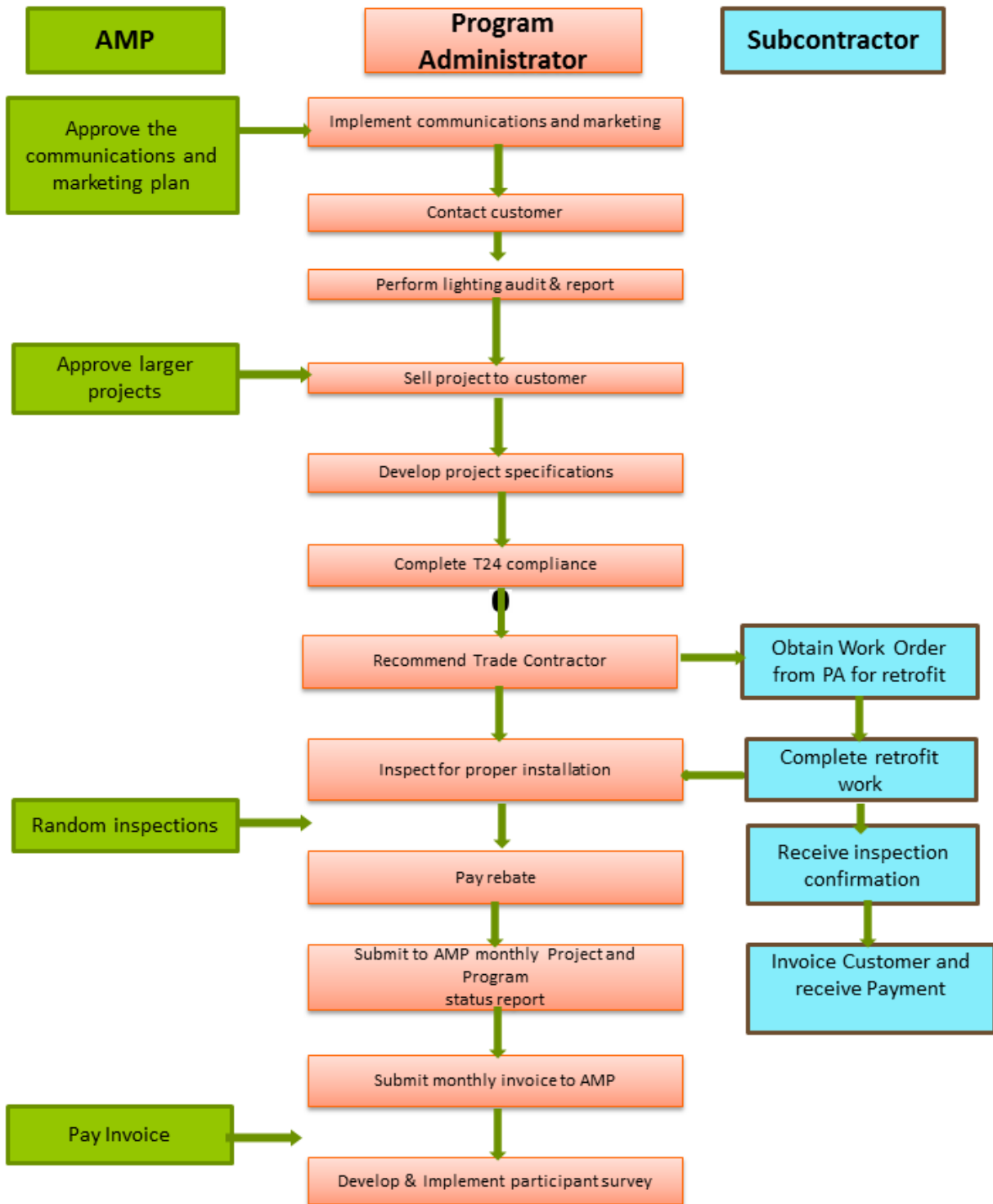
- Program design, including developing a list of measures, technical requirements, appropriate rebates, program procedures, program tracking and reporting, and final report.
- Work with AMP staff to develop and implement a communications plan.
- Determine participation requirements for lighting retrofit subcontractors, recruit and train qualified subcontractors, and maintain quality assurance of subcontractors work.
- Program marketing and marketing materials.
- Coordinate with other pertinent agencies.
- Conduct lighting audits.
- Sell the project to customers.
- Develop project design and specifications.
- Create Work Order and refer customer to a qualified lighting retrofit contractor.
- PA will comply with all applicable local, State and Federal regulations regarding permits, construction, and waste disposal.
- Compliance with all aspects of Title 24 compliance (2013 CA Building Energy Standards) effective July 1, 2014.
- Oversight and inspection of retrofit jobs by program lighting retrofit subcontractors
- Payment of rebates
- Monthly project and program tracking and reporting must upload directly and reliably into the E3 tool and the database energyOrbit.
- Ensure that all customer information is secure
- Design and implement an online customer survey to measure customer satisfaction with the program and identify opportunities for program improvements
- Final report that includes program goals, approach, results, impact of Title 24, conclusions, and recommendations.

AMP will provide program oversight, additional quality assurance, and customer data.

### **PROCESS FLOW FOR TURNKEY RETROFITS**

The illustration on the following page is the envisioned process flow for program implementation. Note that this process flow is subject to modification and may not be appropriate for all customer types. The PA will have an opportunity to recommend alternatives to this model.

## Program Implementation Flow Chart



## **LIGHTING MEASURES**

This program is designed to offer commercial customers comprehensive lighting solutions that help the customer save energy and/or manage energy use and in doing so, reduce energy costs. A comprehensive lighting solution is one that maximizes energy savings at the site, while avoiding the stranding of less cost-effective lighting efficiency opportunities. The PA must therefore be able to bundle quick payback lighting measures against those with a longer payback into a comprehensive package.

Specific technical and performance requirements will be developed to ensure that program participants get the most appropriate energy efficiency retrofit and incentives will be used to make the retrofits cost effective for the customer. The requirements must be similar to AMP's existing technical requirements. All project retrofits will comply with Title 24 and associated compliance forms must be completed and submitted to the City of Alameda Building Department.

AMP staff and PA will develop a list of lighting measures based upon current California utility best practices. Two areas of emphasis are:

1. Whole building lighting retrofits
2. Cost effective light emitting diode retrofits for exterior lighting, interior spaces with high intensity discharge fixtures, track lighting, recessed cans, and light fixtures on dimmers

In the case of retrofitting a four-foot T12 fluorescent lamp to a high performance or low-wattage T8 lamp, the dual baseline approach will be used to claim energy savings. The remaining useful life of the T12 lamp will depend upon the building type, hours of use, and existing lighting controls.

## **INCENTIVES**

The incentives for this program will be based upon the project energy savings and type of lighting technology. The customer must have the choice to receive the incentive directly or apply the amount towards the cost of the project to be paid directly to the lighting retrofit subcontractor.

The rebate amounts should be set at a level necessary to drive program participation. Incentives should not exceed \$100,000 per customer. AMP prefers that customers share in the cost of each project, but is not specifying the minimum customer co-pay.

Incentives must be performance-based, according to the actual kWh saved or kW reduced. AMP prefers the actual lighting equipment and hours of operation be used in calculating the energy savings. Additionally, photographs must be taken of the types of existing equipment for each customer lighting retrofit project. The photographs must be filed with the customer application. If there are difficulties in determining details on the actual conditions, the default values for lighting equipment and hours of operation should be taken from the "Savings Estimation Technical Reference Manual for the California Municipal Utilities Association (TRM)" May 5, 2014; or a comparable source. Included in the TRM is an "ENERGY SAVINGS\_NONRES LIGHTING" calculator. AMP prefers the PA use the TRM calculator; or if the PA wishes to use another lighting calculator, the PA must do comparison runs to ensure the results of the two calculators are reasonably similar.



## **COMMUNICATIONS AND MARKETING**

The PA will be responsible for program communications and marketing, but can expect to receive guidance and final approval from AMP. The PA will be expected to leverage existing networks and channels, such as the local government, associated utilities and agencies, and business associations. Program communications will be done via AMP's website, Facebook, Twitter, commercial customer newsletter, bill inserts for commercial customers, monthly newsletter in the electric bill, and other means as appropriate. Contractor will provide content for the aforementioned.

AMP believes the most successful marketing approach to commercial customers is going to be talking to them directly at their place of business. The bulk of the marketing efforts of the PA will be this approach.

## **PROJECT INSTALLATION**

If a customer chooses to participate in the "Commercial Lighting Retrofit Program" the PA will generate a Contractor Work Order and refer the project to a participating lighting retrofit contractor. The PA will also take responsibility for getting a signed Consent Release Form if the participant is interested in a customer profile to be put on AMP's website, Facebook, or other communications tool. It is not necessary for the customer to agree to this, the Consent Release Form is optional.

The PA will determine participation requirements for lighting retrofit subcontractors, recruit and train qualified subcontractors, maintain quality assurance of subcontractors work. The PA will work with AMP to establish fair market value for light products and contractor labor rates. AMP must approve the content and format of the customer lighting proposal, all customer, contractor, subcontractor forms associated with this program. All lighting retrofit subcontractors will sign AMP's Confidential Agreement form.

The subcontractor will work with customer to complete the project installation at a time and manner that is agreeable to the customer. The PA will provide oversight of lighting retrofit subcontractors and post installation inspections on all projects.

## **COORDINATION WITH OTHER EFFICIENCY PROGRAMS**

There are other programs from AMP and from other utilities and agencies that may complement the efforts of AMP's Commercial Lighting Program. The contractor will be responsible for referring customers to other programs, such as:

- AMP's Commercial HVAC Program.
- AMP's Commercial Customized Program
- Pacific Gas & Electric for gas measures
- East Bay Municipal Utility District for water conservation
- Alameda County Green Business Program, to be certified as a green business
- Energy Star's Portfolio Manager
- AMP's Green Power Program to purchase Green-e Energy Certified clean energy

## REPORTING AND TRACKING

AMP must approve the content and format of all project and program tracking reports. The project and program tracking data must upload easily, directly, and reliably to the E3 tool, an excel application developed by Energy and Environmental Economics for utility reporting energy efficiency costs and benefits; and must also upload to energyOrbit an energy efficiency database with a Salesforce.com platform.

### 3.3 Timeline

The term of the contract shall extend from the date of execution by AMP for a period of twelve (12) months. Dates may be subject to change. Work stoppage for more than one week is not allowable unless it has been prearranged and mutually agreed upon by AMP and PA.

### 4.0 Scope of Work with Deliverables

The Proposer shall provide all labor, material, and equipment required to perform the Scope of Services and Work described in this Request for Proposals.

The following Scope of Work is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project. The following are work tasks assumed necessary to meeting the goals of the Commercial Lighting Retrofit Program. Proposing teams may suggest process improvements as part of their response to this RFP.

#### 4.1 Kickoff Meeting

The Project Manager and pertinent staff for the Program Administrator (PA) shall attend a “kick-off” meeting at AMP to discuss technical details related to the contract, within 10 days of the Notice to Proceed.

**Deliverables:**

- Notes from the project kick-off meeting

#### 4.2 Program Development and Management

Program Development activities described below shall be completed within 40 days of the Notice to Proceed.

**1. Energy Efficiency Measures, Technical Requirements, and Rebate Levels**

- a. The PA will work with AMP staff to develop a list of energy efficiency measures that will be included in the program.
- b. The PA will work with AMP staff to develop the rebate structure, product technical requirements, and warranty requirements. The rebate structure must be set up to pay for performance, according to the actual hours of operation for the business.
- c. In the case of retrofitting a four-foot T12 fluorescent lamp to a high performance or low-wattage T8 lamp, the dual baseline approach will be used to claim energy savings. The remaining useful life of the T12 lamp will depend upon the building type, hours of use, and existing lighting controls.

- d. The energy use of the actual lighting equipment and hours of operation should be used, if there are difficulties in determining details on the actual conditions, the default values for lighting equipment and hours of operation should be taken from the “Savings Estimation Technical Reference Manual for the California Municipal Utilities Association (TRM)” May 5, 2014.
- e. If the PA chooses not to use the TRM lighting calculator and wishes to use their own lighting calculator; the PA must do comparison runs between the two lighting calculators to ensure the results of the two calculators are reasonably similar.

**Deliverables:**

- List of energy efficiency measures, technical requirements, warranty requirements, and corresponding rebates (draft and final)
- Comparison runs of the PA lighting calculator with the “Savings Estimation Technical Reference Manual for the California Municipal Utilities Association (TRM)” May 5, 2014 are required if the PA is not using the TRM

**2. Lighting Retrofit Subcontractor Requirements, Recruitment, and Training**

- a. The PA will determine participation requirements for lighting retrofit subcontractors, including certification, contractor licenses, insurance, quality assurance, and equipment and installation pricing, with final approval from AMP
- b. The PA will recruit qualified lighting retrofit subcontractors for participation in the program, and establish agreements to ensure trade contractors continue to meet program requirements. Trade contractors must have appropriate licenses for the work they will perform (e.g., C-10 Electrical, City of Alameda Business License.)
- c. The PA will develop and deliver training for participating lighting retrofit subcontractors, with input and approval from AMP.

**Deliverables:**

- Subcontractor participation requirements
- Subcontractor training curriculum
- List of participating subcontractors
- AMP Confidentiality Agreement signed by subcontractors

**3. Communications and Marketing**

- a. The goal of the communications and marketing component is to facilitate the success of the “Commercial Lighting Program”. The success is measured by the level of program participation, energy efficiency savings, cost effectiveness of the program, customer satisfaction, and the visibility of the program among all customer sectors.
- b. The target audience for program participation is the commercial sector and the target audience for the program visibility is all program sectors.
- c. The PA will work with AMP staff to develop the program messages. The messages will be consistent with AMP goals such as energy efficiency, reducing GHG emissions, and excellent customer service. Consideration will be given to the barriers and benefits to commercial customers pertaining to energy efficient lighting retrofits.
- d. The PA will develop a plan includes goals, description of the audience, messages, list of communications channels, activities and materials, plan implementation, and mid-course evaluation with appropriate changes. Program outreach may include street-level in-person contact, collaboration with business associations, telephone contacts, and web-based campaigns. The plan should include a customer recognition strategy, such as the development

and communications of case studies that will be used in AMP outreach venues such as Facebook, Website, customer newsletters.

- e. The PA will develop promotional materials. The materials will be coordinated with AMP staff to ensure consistency with AMP messages.
- f. The PA with support from AMP will promote the program according to the Communication and Marketing Plan.
- g. At six months into the program, AMP and Contractor will evaluate the communications and make corrections if needed.

**Deliverables:**

- Communication and Marketing plan
- Communication and marketing materials
- Description of program communication activities included in monthly status reports
- Results and recommendations from a six-month evaluation

**4. Program Standards and Procedures**

- a. The PA will develop standards and procedures for all other aspects of the program with input from AMP, including but not limited to:
  - program forms
  - customer contact / site access
  - lighting audits
  - customer audit reports
  - Title 24 compliance
  - project permitting
  - construction management
  - project safety
  - recycling and disposal of equipment
  - payment of rebates
  - customer service and complaint resolution
  - project verification
  - program reporting and tracking
- b. The PA will develop templates and forms consistent with these standards and procedures.
- c. Work stoppage for more than one week is not allowable unless it has been prearranged and mutually agreed upon by AMP and PA.

**Deliverables:**

- Program Standards and Procedures
- Program forms

**5. Program Flowcharts**

- a. The PA will develop a flowchart that depicts the processes and communication loops for the program. The flowchart should document the responsibilities of the various parties, including AMP, the PA and the lighting retrofit subcontractor.

**Deliverables:**

- Program flowcharts (draft and final)

## **6. Quality Assurance and Quality Control Protocols**

- a. The PA will develop quality assurance and quality control protocols addressing professionalism in marketing and sales, project design, construction, product performance, and product warranties.

### **Deliverables:**

- Quality assurance protocols

## **7. Auditor / Salesperson Training**

- a. The PA will develop and deliver training for the commercial lighting auditors and salespeople.

### **Deliverables:**

- Auditor / salesperson training curriculum (draft and final)

## **8. Program Tracking and Reporting Database**

- a. The PA will develop a tracking and reporting database to collect, store, and report the following data:
  - # Projects
    - By project stage
    - By business type
    - By rate schedule
  - Measures installed
    - By end use type (e.g., lighting, lighting controls)
    - By business type and peak usage category
  - Square footage of buildings audited
  - Square footage of buildings retrofitted
  - Total kWh saved
  - Total kW saved
  - Monthly and program-to-date expenses, broken out by task
  - Program forecast going forward (kWh, kW, \$)
  - Graph of program expenditures - actual versus expected
  - Graph of kWh saved - actual versus expected
- b. The database must reliably, easily, and directly upload to the E3 tool and the energyOrbit database.

### **Deliverables:**

- Tracking and reporting database as described above

## **9. Project Financing**

- a. The PA is expected to make program participants aware of the CaliforniaFIRST Property Assessed Clean Energy (PACE) program sponsored by the California Statewide Communities Development Authority ("California Communities").

### **Deliverables:**

- Inclusion in communications and marketing information a referral to the PACE program

## **4.3 AMP Customer Project Development and Management**

### **1. Energy Audit and Report**

- a. The PA will be responsible for obtaining a signed authorization from the customer prior to the walk through of the customer's facility.

- b. The PA will collect prescribed information about the customer including site-specific information (street number, street name, zip code, square footage, ownership status), contact information (name, title, phone number, email address, secondary contact), language needs, utility account number, and hours of operation.
- c. The PA will be responsible for conducting the lighting audit at the customer's facility. The audit will include digital photos of the customer's existing types of lighting equipment.
- d. The PA will analyze the energy efficient lighting opportunities at the facility and develop a comprehensive list of lighting retrofits that leverages low-cost/no-cost measures against those with a longer payback.
- e. The PA will generate a customer audit report that includes at a minimum:
  - Recommended measures
  - Expected gross project cost
  - Incentive
  - Net project cost
  - Energy savings
  - Bill savings
  - Simple payback

**Deliverables:**

- Signed customer site access authorization form
- Customer information
- Customer audit report
- Photos of customer existing lighting equipment as an electronic file

**2. Sales and Cross-Marketing**

- a. The PA will be responsible for selling the project to the customer and obtaining customer approval to proceed.
- b. The PA will be responsible for providing the customer with information about programs that may provide additional incentives or that may otherwise benefit the customer. Examples of other programs that may enhance services are:
  - AMP's Commercial HVAC Program.
  - AMP's Commercial Customized Program
  - Pacific Gas & Electric for gas measures
  - East Bay Municipal Utility District for water conservation
  - Alameda County Green Business Program, to be certified as a green business
  - Energy Star's Portfolio Manager and Benchmarking
  - AMP's Green Power Program to purchase Green-e Energy Certified clean energy

**3. Project Design and Construction Management**

- a. The PA will document project design and specifications in a project Scope of Work for customer and landlord/owner approval, as appropriate. For larger projects, the PA will obtain AMP approval prior to proceeding. The qualification for a larger project will be agreed upon by the PA and AMP. The project Scope of Work should include the following:
  - Objectives and task list
  - Quantities and types of equipment to be installed, including specifications
  - A simple drawing noting where the equipment is to be installed
  - Materials, installation, and commissioning specifications
  - Title 24 compliance and other required permits, if required by the City of Alameda Building Department

- Waste disposal and/or recycling requirements, if applicable
- b. Products installed in the Program shall be in accordance with all applicable local, state and federal building and/or electrical codes, and must meet minimum performance requirements approved by AMP. Copies of building permits required for installations and construction work must be provided as part of project documentation.
- c. The PA will arrange for the installation of specified equipment and provide construction management services. These services may include scheduling, ensuring compliance with recycling or disposal requirements, inspections, managing equipment warranty cycles, verifying required permits, and other construction management tasks as necessary.

**Deliverables:**

- Project design and specifications
- Title 24 compliance report
- Signed construction contracts
- Inspection reports
- Copies of any necessary permits

**4. Payment of Rebates**

- a. After project completion and verification, the PA will pay the appropriate rebate amount to the customer or lighting retrofit contractor.

**Deliverables:**

- Record of rebates paid
- Record of pending rebates
- Follow-up for rebate checks not cashed within one month
- Documented security measures for handling rebate funds

## 4.4 Tracking and Reporting

**1. Project Reporting**

- a. On a monthly and as-needed basis, the PA will provide project level updates that will include the following:
  - Project status (e.g., audit completed, assigned to trade contractor, project complete)
  - Customer information:
    - Business name
    - Business type
    - AMP account #
    - Rate schedule
    - Electricity rate
    - Square footage
    - Contact information (include mailing and premise address)
    - Tenant or owner?
    - Name of property management company, if applicable
  - Completed Audits
    - Audit completion date
    - Estimated annual kWh and kW savings potential
    - Recommended measures
  - Completed Retrofits

- Retrofit completion date
- Title 24 compliance completed and submitted, if applicable
- Date of post installation inspection
- Cost information
  - AMP incentive paid
  - Total installed cost
- Expected energy savings
  - Expected kWh saved
  - Expected kW saved
  - Estimated annual cost savings
  - Estimated payback period
- Installed measures:
  - Description of existing equipment
  - Description of installed equipment
  - Operating hours
  - # of units installed
  - kWh saved per unit
  - kW saved per unit
  - Assumed measure life
  - Rebate per unit
  - Installed cost per unit (labor + equipment, before rebate)
  - Permit and Title 24 information (if applicable)
  - Name of installation contractor
  - Contractor certification or license type

**Deliverables:**

- Monthly and as-needed Project Reports
- Tracking data uploaded directly to the E3 tool and energyOrbit

**2. Program Status Reports**

- a. The PA will submit monthly invoices and Program Status Reports within 15 days after the end of each month, and a Quarterly Program Status Report no more than 20 calendar days after the end of each quarter. Program Status Reports will at a minimum include:
  - Communications and Marketing activities
  - Program budget status
  - Programmatic issues and how they were resolved.

**Deliverables:**

- Monthly Program Status Reports
- Quarterly Program Status Reports
- Tracking data uploaded directly to the E3 and energyOrbit Tool



## 4.5 Final Report

The PA will prepare a final report that describes the program goals, approach, results in terms of cost and benefits – Total Resource Cost Test and utility and customer levelized cost, impacts of the new title 24, conclusions, and recommendations of the work performed under this contract.

Also, the final report must include some conclusions regarding the impact of the new CA Title 24 Building Energy Code which is effective 7/1/2014. The impacts should include the average increased cost – equipment and labor per project as a percent of total project cost, impact on customer attitudes towards completing lighting retrofit, and recommendations for best working with building officials on complying with the Title 24.

As part of the final report the PA will design a customer survey to gauge customer satisfaction – participants and nonparticipants - to identify opportunities for program improvements. The survey may be done using an online survey tool. AMP will review and approve the Final Report.

### **Deliverables:**

- Draft of the participant and nonparticipant survey
- Outline of the final report
- Final Report

## 5.0 License Requirements for Proposers

### **LICENSE REQUIREMENT**

In accordance with Public Contract Code Section 3300 and Business and Professional Code Section 7059, AMP has determined that all Bidders must possess a current CALIFORNIA GENERAL BUILDING CONTRACTOR (B) LICENSE.

When a final contract has been executed the PA must have a City of Alameda Business License.

## 6.0 Timeline and Due Dates

The estimated timeline is as follows:

RFP Issued	8/22/2014
Vendor RFP Questions Due	9/5/14 No later than 3:00 PM (PT)
Proposals Due	9/11/2014 No later than 3:00 PM (PT)
Vendor Presentations/Demonstrations	September/2014 (if requested by AMP)
Vendor Selection and Contract Preparation	September/2014
Contract Awarded	Q4/2014
Work Commences	Q4/2014
Kick off Meeting	Q4/2014
Six Month Program Evaluation	May/2015
Program Completed	6/30/2015*
Final Report Due to AMP	6/30/2015*

\* If program completion by June 30 is not possible, please provide an estimate of your projected timeline to complete the program.

NOTE: Dates and times are subject to change by AMP.

## 7.0 RFP Questions

All questions concerning this RFP should be submitted by e-mail to Meredith Owens at [owens@alamedamp.com](mailto:owens@alamedamp.com) and Ken Javorsky at [javorsky@alamedamp.com](mailto:javorsky@alamedamp.com). Other utility personnel are not authorized to discuss or answer questions about this RFP with responders. Contact regarding this RFP with any AMP personnel other than the one listed above could result in disqualification. All questions regarding this RFP must be received by the date and time indicated in the section Procurement Timeline and Due Dates.

## 8.0 Term of Contract

The term of the contract shall extend from the date of execution by AMP for a period of thirty-six (36) months, unless terminated earlier as set forth in Attachment A – Professional Services Agreement.

## 9.0 Non-Conforming Proposal

A proposal shall be prepared and submitted in accordance with the provisions of these RFP instructions and specifications. Any alteration, omission, addition, variance, or limitation of, from, or to a proposal may be sufficient grounds for non-acceptance of the proposal, at the sole discretion of AMP. AMP shall have full discretion as to whether a bid is credible.

## 10.0 Administrative Requirements

Proposals shall include the following required elements, described as administrative requirements. All proposals will be scored based on the following sections, Section 10.0 and 11.0.

### **Company Information**

- **Cover Letter**  
The cover letter must be signed by an individual with the authority to bind the proposer and include the name, title, address, phone number and email for that individual. In the letter, the proposer must acknowledge the receipt of any RFP amendments issued by AMP. Proposer must also commit to the success of the project and to being the single point of responsibility even if subcontractors are to be used.
- **Executive Summary**  
Proposer must include an executive summary (five pages or less) that describes (at a high level) the proposed solution, how the solution will be implemented, who (company and staff) will complete the work and the time necessary for the proposed work.
- **Proposer Background**  
Describe the Proposer's business and background, including the size, location, capacity, type of firm, and year established. Describe the organization's structure, including a description of those managers, officers and/or executive that will be responsible for this project.

- **Proposer Financial**  
Include three years of financial statements that provide a third-party audited overview of income, assets, and cash flow.

Proposer must be capable of maintaining the cash flows required to implement this program, although PA will be able to invoice AMP monthly for all appropriate expenses. Proposer must have account payable capabilities to pre-pay customer rebates.

### **Experience**

Describe the proposers experience as follows:

- **Development and Management**  
Experience implementing and operating at least three programs in the San Francisco Bay area of similar size and complexity to AMP's performed in the last 5 years. For two of these three programs, provide the following information:
  1. Brief program description, not more than one page
  2. Total program budget, with rebates and administrative costs split out
  3. Number of projects completed
  4. kWh/year savings (first year)
  5. Average project cost and customer rebate
  6. Lifetime utility cost per kWh
  7. Results of the total resource cost test
  8. Examples of communications and marketing materials
  9. Example of a customer audit report
  10. Example of the lighting equipment technical requirements
  11. Safety procedures
  12. Recycling and disposal of equipment procedures
  13. Examples of the post installation project verification procedure
  14. References - Provide at least one client reference for each of the two programs described above, including contact name, title, company name, address, phone and email
  15. Tracking & Reporting – Provide evidence of successfully and directly loading program and project tracking data to the E3 tool and the energyOrbit database.
  16. Title 24 - Provide evidence of knowledge and/or experience with the new CA Title 24 Building Energy Standards effective July 1, 2014.
  - 17. Lighting Calculator** - Provide information on the lighting calculator you plan to use for this program. Note that AMP has a lighting calculator as part of the California Municipal Utilities Association's recent Technical Resource Manual (TRM - May 2014). If the proposer does not use AMP's TRM, the results of the proposers lighting calculator, must be similar to the TRM; and the proposer must provide proof that the results are the similar. This is the link to TRM lighting calculator, [www.alamedamp.com/lighting-calculator](http://www.alamedamp.com/lighting-calculator)

### **Staffing**

The proposer must provide program management support sufficient to create and implement the Direct Install Commercial Lighting Retrofit Program. Additionally, AMP expects the proposer's Program Manager to be responsible for all the deliverables in Sections 4.0 to 4.5 of this RFP.

Describe the proposed project team and their qualifications as follows:

- Provide an Organizational Chart that identifies all key team members and their titles.

- Provide an overview of the project manager's experience. This project manager should have experience working on at least three programs of similar scope and complexity.
- Describe each team member's proposed responsibilities.
- Provide bios for all key solution team members.

Proposer must sign an AMP Confidentiality Agreement, an example is attached to this RFP.

### **Subcontractors**

AMP intends to enter into a relationship with a single responsible (Prime) contractor to deliver the required products and services. The Prime may retain and employ subcontractors as necessary in order to meet the requirements of the Program. Proposals shall include the identification of all subcontractors with an explanation of the products and/or services to be provided and their pricing. Nothing contained in the contract shall create any contractual relation between any subcontractor and AMP.

All program lighting retrofit subcontractors must sign an AMP Confidentiality Agreement; an example is attached to this RFP.

### **Timeline**

The term of the contract shall extend from the date of execution by AMP for a period of twelve (12) months, or until the funds have been expended. The Program Development work must start within one week of the contract being executed. Work stoppage for more than one week is not allowable unless it has been prearranged and mutually agreed upon by AMP and PA.

## **11.0 Pricing**

Proposers must provide a detailed budget for all program costs, pricing information regarding the lighting retrofit subcontractors, and an estimate of the annual energy savings the program will provide.

## **12.0 Contract Terms and Conditions**

AMP reserves the right to amend or cancel this RFP at any time if the best interest of utility requires such action.

AMP reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal if deemed in the best interest of AMP.

AMP assumes no liability in any fashion with respect to this RFP or any matters related thereto. All prospective service providers and their assigns or successors, by their participation in the RFP process, shall indemnify, save and hold AMP and its employees and agents free and harmless from all suits, causes of action, debts, rights, judgments, claims, demands, accounts, damages, costs, losses and expenses of whatsoever kind in law or equity, known and unknown, foreseen and unforeseen, arising from or out of this RFP and/or any subsequent acts related thereto, including but not limited to the recommendation of a service provider and any action brought by an unsuccessful prospective service provider.

A copy of AMP's standard Professional Services Agreement is included in the RFP as Attachment B. AMP may reject proposals that contain exceptions to the terms and conditions included in this RFP and/or

Professional Services Agreement. Proposers are required to identify any exceptions or objections to the terms and conditions included in this RFP and/or Professional Services Agreement as a part of the proposal submission.

## 13.0 Proposal Response Format

Proposals should be organized into the following sections:

- A. Table of Contents
- B. Cover Letter
- C. Executive Summary
- D. Response to Administrative Requirements, reference Section 10.0
- E. Response to Pricing, reference Section 11.0

## 14.0 Proposal Submission Instructions

Vendors must submit (2) hardcopies and one electronic copy. On the envelope, proposers must state "Proposals for Direct Install Commercial Lighting Retrofit." The hardcopies must be delivered to: Jackie Tompkins, Support Services, 2000 Grand Street, Alameda, CA 94501. Proposals must be submitted according to the specified deadlines and format provided in this RFP.

## 15.0 Proposal Review and Vendor Selection

AMP reserves the right to award an agreement to the Proposer whose proposal most closely satisfies AMP's needs and is deemed to be most advantageous to AMP. The proposal that best fits AMP's program and customer needs takes priority over pricing. AMP reserves the right to accept or reject any proposal; and the right to not award any contract. AMP also reserves the right to waive any minor informality or irregularity in any proposal.

## 16.0 Notification of Award

Responders will be notified whether they are selected to provide the expertise and services requested within this RFP. Awards are contingent on available funding and the Contractor's successful execution of a contract agreement within the specified timeframe.