



California Department of Community Services and Development
Low Income Weatherization Program Regional Administrators RFP
Bidders' Conference

Agenda

- 10:30 – 10:35** ***Welcome & Program Overview***
Jason Wimbley, Chief Deputy Director, CSD
- 10:35 – 10:50** ***Procurement Overview: Andrew Chang, Procurement Consultant***
Q and A
- 10:50 – 11:00** ***Regional Administrator Qualifications: Glen Baird, CSD***
Q and A
- 11:00 – 11:10** ***Requirement One: Project Team Description/Qualifications***
Q and A
- 11:10 – 11:20** ***Requirement Two: Approach and Workplan***
Q and A
- 11:20 – 11:35** ***Requirement Three: Cost Proposal***
Q and A
- 11:35 – 11:45** ***Submission Package Requirements***
Q and A
- 11:45 – 11:55** ***Scoring***
Q and A
- 11:55 – 12:05** ***Contractor GHG Goals (Project Planning Tool)***
Q and A
- 12:05 – 12:30** ***General Questions & Answers***

Solicitation Submission Checklist

Form	Description
<input checked="" type="checkbox"/> Attachment 1	Required Submissions Checklist
<input checked="" type="checkbox"/> Requirement 1 (Section IV.A)	Statement of Understanding of Regional Needs
<input checked="" type="checkbox"/>	Project Team Description
<input checked="" type="checkbox"/>	Project Organization Chart
<input checked="" type="checkbox"/> Requirement 2 (Section IV.B)	Overall Approach
<input checked="" type="checkbox"/>	Workplan Narratives (Deliverables)
<input checked="" type="checkbox"/> Requirement 3 (Section IV.C)	Cost Proposal Narrative
<input checked="" type="checkbox"/> Attachment 2*	Proposal/Proposer Certification Sheet
<input checked="" type="checkbox"/> Attachment 3*	Secretary of State Registration, if applicable
<input checked="" type="checkbox"/> Attachment 4*	Minimum Qualifications Certification and required documentation
<input checked="" type="checkbox"/> Attachment 5*	Fiscal Processes Certification
<input checked="" type="checkbox"/> Attachment 6	Workplan Timeline
<input checked="" type="checkbox"/> Attachment 7	Deliverables Cost Sheet Attachment
<input checked="" type="checkbox"/> Attachment 8	LIWP Budget Summary and Bid Sheet Attachment
<input checked="" type="checkbox"/> Attachment 9	References Attachment
<input checked="" type="checkbox"/> Attachment 10*	Bidder Declaration (GSPD-05-105)
<input checked="" type="checkbox"/> Attachment 11*	Contractor Certification Clauses (CCC-307)
<input checked="" type="checkbox"/> Attachment 12*	Darfur Contracting Act Certification, if applicable
<input checked="" type="checkbox"/> Attachment 13*	Certification of Financial Solvency for Non-Profit Organizations

***Original copy only**

Procurement Key Dates

Activity	Action Date
Optional Bidders' Conference	11/15/2016
Optional Intent to Bid Submission	11/28/2016
Deadline to Submit Written Questions	11/28/2016
Deadline to Submit Request for Requirements Change	11/28/2016
Questions and Answers Posted	12/02/2016
Deadline to Submit Proposals	12/09/2016
Notice of Intent to Award	12/30/2016
Proposed Award Date	01/06/2017
Contract Start Date	02/01/2017

All Additional Questions and Comments shall be Made in Writing.

- Throughout the procurement process (from public comment to the award date), CSD will work to ensure all potential proposers have a level playing field and that CSD operates in a manner that is accountable to the public.
- CSD will **not** be able to take personal meetings or respond to telephone inquiries regarding the solicitations to ensure a level playing field, full transparency and the integrity of the solicitation.
- All correspondence, questions, or inquiries shall be made to Sean Hammer at sean.hammer@csd.ca.gov or 916-576-5312 by Close of Business on November 28, 2016.
- Questions submitted by email will be posted for view by the public. Alternately, questions submitted by phone will be transcribed and posted with answers on the CSD and eProcurement websites. All questions will be posted anonymously.
- Only written responses posted on the CSD website shall be considered binding; answers provided verbally shall **not** be considered binding.
- Check the bid posting site often!
- Follow the Submission Checklist and Procurement Timeline.

***QUESTIONS AND
ANSWERS?***

Regional Administrator Qualifications

Minimum Qualifications

- ☑ The Prime Proposer shall be a local governmental entity or non-profit organization;
- ☑ The Proposer team shall demonstrate a minimum of three (3) years' experience administering and performing energy efficiency and solar PV installations in existing housing;
- ☑ The Proposer team must be in good standing with the appropriate local and state oversight licensing authorities and is currently qualified to legally conduct business in California; and
- ☑ The Proposer team shall maintain an active Class B, General Contractor License, issued by the California Contractors State License Board throughout the life of the contract. The Proposer team shall provide the contractor number of all specialty contractors for CSD to independently verify standing with State Contracting Board.

Desirable Qualifications

- ☑ The Prime Proposer shall demonstrate expertise and success in administering energy efficiency and/or renewable energy grants or contracts and managing teams similar in scope and nature to that which is being proposed;
- ☑ The Proposer team shall demonstrate understanding, experience, expertise and capacity in marketing energy efficiency, solar PV and related services to low income residents within the regions for which it is applying;
- ☑ The Proposer team shall demonstrate understanding, experience, expertise and capacity to install energy efficiency, solar PV and related services for low income residents within the regions for which it is applying;
- ☑ The Proposer team shall demonstrate understanding, experience, expertise and capacity to utilize energy audit tools to perform system sizing for energy efficiency, solar PV and related services for low income residents within the regions for which it is applying;
- ☑ The Proposer team shall demonstrate experience, expertise and capacity in providing workforce development and/or related services to low income residents within the regions for which it is applying;
- ☑ The Prime Proposer shall be able to demonstrate the soundness of the organization's fiscal processes involved in budgeting, subcontracting, and payroll management.

***QUESTIONS AND
ANSWERS?***

Requirement One: Team Description

Part I: Proposers bidding on a single region or multiple regions may respond to the following requirements in a single document, but submit the required numbers of copies for each region. Alternatively, bidders submitting a proposal for multiple regions may submit regionally specific documents as required (e.g. Project Organization Charts).

Requirement 1: Project Team Description (see Section IV.A): **90 POINTS**

- Statement of Understanding of Regional Needs
- Project Team Description, including how meet desirable qualifications
- Project Organization Chart

Requirement One: Team Description

Associated Attachments:

- **ATTACHMENT 2:** Proposal/Proposer Certification Sheet, signed by an individual who is authorized to obligate the proposing firm contractually. The original signature must indicate the title or position that the individual holds in the firm.
- **ATTACHMENT 3:** California Secretary of State (SOS) registration, if applicable.
- **ATTACHMENT 4:** Minimum Qualifications Certification, with required documentation attached.
- **ATTACHMENT 5:** Fiscal Process Certification.

***QUESTIONS AND
ANSWERS?***

Requirement Two: Approach and Workplan

Requirement 2: Workplan (see Section IV.B): 130 POINTS

- Overall Approach
- Workplan Narrative, including a Workforce Development Plan; addressing how the key performance indicator of achieving 40 percent of direct program expenditures by September 30, 2017, will be met; and including narrative on:
 - Deliverable 1: LIWP Ramp-Up Report
 - Deliverable 3: LIWP Regional Market Assessment and Marketing Approach
 - Deliverable 4: Quality Assurance and Customer Satisfaction Approach

Associated Attachment:

- **ATTACHMENT 6: Workplan Timeline**

Attachment 6: Workplan Timeline

Task/Activity #	Task/Activity	Month 1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
1.0.0	Deliverable 1: LIWP Ramp-Up Report	█											
1.1.0		█											
1.1.1		█											
1.1.2		█											
2.0.0	Deliverable 2: Completed Project Planning Tool	█											
2.1.0		█											
3.0.0	Deliverable 3: LIWP Regional Market Assessment and Marketing Approach	█											
3.1.0		█											
3.1.1		█											
4.0.0	Deliverable 4: Quality Assurance and Customer Satisfaction Approach	█											
4.1.0		█	█	█	█	█	█						
4.1.1		█	█	█									
5.0.0	Deliverable 5: LIWP Marketing Implementation Report	█	█										
5.1.0			█										
6.0.0	Deliverable 6: Monthly Contract Activity Report			█									
6.1.0				█									
6.2.0				█									
7.0.0	Deliverable 7: Closeout Report				█								
7.1.0					█	█	█						
7.1.1					█	█	█						
7.1.2						█							

***QUESTIONS AND
ANSWERS?***

Requirement Three: Cost Proposal

Part 2: Proposers bidding on a single region or multiple regions must submit regionally specific Cost Proposal documents (an original for each region and the required numbers of copies for each region).

Requirement 3: Cost Proposal (see **Section IV.C**): 110 POINTS

- Cost Proposal Narrative (10 points)

Associated Attachments (100 points):

- **ATTACHMENT 7:** Deliverables Cost Sheet
- **ATTACHMENT 8:** Program Budget Summary and Bid Sheet

Attachment 7: Deliverables Cost Sheet

Deliverables Cost Sheet

Project Role	Name	Hourly Rate
Team member 1	A	\$
Team member 2	B	\$
Team member 3	C	\$

Deliverables	Estimated Hours			Total Staff Cost	Total Other Costs	Total Amounts
	A	B	C			
1) LIWP Ramp-Up Report						\$
2) Completed Project Planning Tool						\$
3) Market Assessment and Approach						\$
4) Quality Assurance Approach						\$
5) Marketing Implementation Report						\$
6) Monthly Contract Activity Report						\$
7) Closeout Report						\$
TOTAL AMOUNT DELIVERABLES:						\$

Attachment 8: Budget Summary and Bid Sheet

LIWP Budget Summary: Region One

TOTAL PROGRAM BUDGET

ADMINISTRATIVE COSTS

Program Support Costs (Total of Department and Bidder Defined Deliverables)

Sub-Total: \$ -

DIRECT PROGRAM COSTS

Total Direct Program Installation Costs (Energy Efficiency and Solar Water Heating Measures) \$ 3,117,455.00

Total Solar PV Installation Costs (Region One Allocation) \$ 2,070,139.00

Marketing and Outreach Costs (Total of Department and Bidder Defined Deliverables)

Sub-Total: \$ 5,187,594.00

TOTAL PROGRAM BUDGET (REGION ONE ALLOCATION)

\$ 5,187,594.00

Attachment 8: Budget Summary and Bid Sheet

Bid Sheet Total

Total Bid Sheet LIWP Costs (EE + SWH)	\$	-
Total Bid Sheet Solar PV LIWP Cost	\$	-
Total LIWP Bid Sheet Costs	\$	-

Basic LIWP Measures

Measure	Quantity	Unit	per Unit LIWP Cost
HOT WATER FLOW RESTRICTOR, FAUCET RESTRICTOR	1.00	per restrictor	
HOT WATER FLOW RESTRICTOR, HAND-HELD LOW FLOW SHOWERHEAD	1.00	per restrictor	
HOT WATER FLOW RESTRICTOR, LOW FLOW SHOWERHEAD	1.00	per restrictor	
LED BULBS EXTERIOR - 60W EQUIVALENT	1.00	per lamp	
LED BULBS INTERIOR - 60W EQUIVALENT	1.00	per lamp	
LED NIGHT LIGHTS	1.00	per light	
VACANCY SENSOR	1.00	per sensor	
POWER STRIP, TIER 2 ADVANCED	1.00	per strip	
THERMOSTATIC SHOWER VALVE AND SHOWERHEAD	1.00	per valve	

Enhanced LIWP Measures

Measure	Quantity	Unit	per Unit LIWP Cost
CEILING FANS	1.00	per fan	
CEILING INSULATION, R0-30	1200 sq feet	per household	
CEILING INSULATION, R0-38	1200 sq feet	per household	
EFFICIENT FAN CONTROLLER - PSC MOTOR	1.00	per motor	

Attachment 8: Budget Summary and Bid Sheet

Solar Water Heating

Measure	Quantity	Unit	Total Installed Cost	Average CSI Thermal Rebate	Average LIWP Cost
SOLAR WATER HEATING, AET 41 SQ.FT., LOW-INCOME	1.00	per unit			\$ -
SOLAR WATER HEATING, AET 41 SQ.FT., MAINSTREAM	1.00	per unit			\$ -
SOLAR WATER HEATING, AET 65 SQ.FT., LOW-INCOME	1.00	per unit			\$ -
SOLAR WATER HEATING, AET 65 SQ.FT., MAINSTREAM	1.00	per unit			\$ -

Solar PV

Measure	Quantity	Unit	Average Total Cost per DC Watt	Average System Size (W)	Average Leveraged Funds per Home	Average Total Installed Cost	Total LIWP Cost	Average LIWP Cost per DC Watt
SOLAR PV	1.00	per unit				\$ -	\$ -	#DIV/0!

***QUESTIONS AND
ANSWERS?***

Submission Package Requirements

	Region 1 Original	Region 1 5 Copies	Region 2 Original	Region 2 5 Copies
Attachment 1	☑	☑	☑	☑
Requirement 1	☑	☑	☑	☑
Requirement 2	☑	☑	☑	☑
Requirement 3	☑	☑	☑	☑
Attachment 2	☑			
Attachment 3	☑			
Attachment 4	☑			
Attachment 5	☑			
Attachment 6	☑	☑	☑	☑
Attachment 7	☑	☑	☑	☑
Attachment 8	☑	☑	☑	☑
Attachment 9	☑	☑	☑	☑
Attachment 10	☑			
Attachment 11	☑			
Attachment 12	☑			
Attachment 13	☑			

Repeat
for
Regions
3, 4, and
5 as
needed.

***QUESTIONS AND
ANSWERS?***

Scoring

Stage	Scoring	Description
Stage 1: Administrative Submission Review	Pass/Fail	Each Proposal will first be checked by CSD for the presence of all required documents as listed in the Proposal Submission Checklist (see ATTACHMENT 1).
Stage 2: Proposal Review	220 Points	<p>The Review Panel will review all Proposals that pass Stage 1 to assess the Proposer’s ability to carry out the proposed work. The Review Panel will review each proposal individually and then score by consensus all aspects of the following requirements:</p> <ul style="list-style-type: none"> ▪ Proposer Team Description/Qualifications (see Section IV.A) (90 points); ▪ Approach and Workplan (110 points); <ul style="list-style-type: none"> – Overall Approach (see Section IV. B); – Workplan Narrative (see Section IV. B) ; and ▪ ATTACHMENT 6: Workplan Timeline (see Section IV.B) (20 points).
Stage 3 : Evaluation of Cost Proposal	110 Points	<p>The Review Panel will review each proposal individually and then score by consensus all aspects of the following requirements:</p> <ul style="list-style-type: none"> ▪ Cost Proposal Narrative (see Section IV. C) (10 points); ▪ Deliverables Cost Sheet and Budget Summary (ATTACHMENTS 7 AND 8) (30 points); and ▪ Bid Sheet (ATTACHMENT 8) (70 points).
		Once the Proposer has reached the minimum point value of 230 (from possible 330):
Stage 4: Reference Checks	30 Points	CSD will contact the references provided (See ATTACHMENT 9). One of the three references must be provided for the prime Proposer of the project team addressing project management (10 points) ; references must also address marketing (10 points) and service delivery (10 points) .
Stage 5: Combining Scores	N.A.	CSD will combine the points of each qualifying Proposer from Stage 2 for the Proposal Review, Stage 3 for the Cost Proposal and Stage 4 for reference checks, and to find the total score for each qualifying Proposer prior to applying bidding preferences.
Stage 6: Adjustments for SB/DVBE Preferences	N.A.	Scores will be adjusted to account for SB and/or DVBE participation

Scoring

Administration and Marketing Cost Components (30 points)		
Proposer	Bid Amount	Low Bid = Maximum points 30 Low Bid /Current Bid x 30 = cost points
A	\$50,000	Low Bid = Maximum of 30 points
B	\$70,000	$\$50,000 \div \$70,000 \times 30 = 21$ pts.
C	\$80,000	$\$50,000 \div \$80,000 \times 30 = 19$ pts.

Measures Cost Component 1: Basic Measures (5 points)		
Proposer	\$ per MTCO _{2e} reduction	Low Bid = Maximum points 5 Low Bid /Current Bid x 5 = cost points
A	\$4,000	$\$2,000 \div \$4,000 \times 5 = 2.5$ pts.
B	\$2,000	Low Bid = Maximum of 5 points
C	\$9,000	$\$2,000 \div \$9,000 \times 5 = 1.1$ pts.

***QUESTIONS AND
ANSWERS?***

Contractor GHG Goals (Project Planning Tool)

LIWP Project Planning Tool

Number of Homes Served		Number of Homes Served by Building Type	
Housing Type	Single Family	Single Family	
Region	CZ	Mobile Home	
	1	Total	0

Total must equal number of homes served.

Program Stats	
LIWP Program Costs (EE + SWH)	\$ -
LIWP Program Costs (Solar PV)	\$ -
Total LIWP Program Cost	\$ -
Total Program Savings (MTCO)	#VALUE!
Total Package \$/MTCO	\$ -
Average per home cost	#DIV/0!
Average per home MTCO reduction	#VALUE!

Basic LIWP Measures

Measure	Average Qty Installed per Home	Unit	% of homes	# of homes	per Unit LIWP Cost	Total LIWP Cost
HOT WATER FLOW RESTRICTOR, FAUCET RESTRICTOR		per restrictor		0		\$ -
HOT WATER FLOW RESTRICTOR, HAND-HELD LOW FLOW SHOWERHEAD		per restrictor		0		\$ -
HOT WATER FLOW RESTRICTOR, LOW FLOW SHOWERHEAD		per restrictor		0		\$ -
LED BULBS EXTERIOR - 60W EQUIVALENT		per lamp		0		\$ -
LED BULBS INTERIOR - 60W EQUIVALENT		per lamp		0		\$ -
LED NIGHT LIGHTS		per light		0		\$ -
VACANCY SENSOR		per sensor		0		\$ -
POWER STRIP, TIER 2 ADVANCED		per strip		0		\$ -
THERMOSTATIC SHOWER VALVE AND SHOWERHEAD		per valve		0		\$ -

\$/Metric Ton CO	Notes
\$ -	
\$ -	
\$ -	
\$ -	
\$ -	
\$ -	
\$ -	
\$ -	
\$ -	

Enhanced LIWP Measures

Measure	Average Qty Installed per Home	Unit	% of homes	# of homes	per Unit LIWP Cost	Total LIWP Cost
CEILING FANS		per fan		0		\$ -
CEILING INSULATION, R-30						\$ -
CEILING INSULATION, R-38						\$ -
EFFICIENT FAN CONTROLLER - PSC MOTOR						\$ -
EFFICIENT FAN CONTROLLER - ECM MOTOR						\$ -

\$/Metric Ton CO	Notes
\$ -	
\$ -	Assumes R0-R30
\$ -	Assumes R0-R38
\$ -	
\$ -	



***QUESTIONS AND
ANSWERS?***

***GENERAL QUESTIONS
AND ANSWERS?***

***Thank You for
Participating!***