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GAVIN NEWSOM
GOVERNOR

Date of Addendum

October 30, 2023

Notice to Applicants

The 2023-RFP-101 for California Arrearage Payment Program (CAPP) is modified as outlined in this revised Addendum. Deletions are indicated by “~~black strikethrough~~” font and additions are indicated by “red underlined” font. The original RFP remains in full force and effect except as modified by this Addendum, which is hereby made part of the RFP. Proposers shall consider this Addendum when preparing and submitting their proposal.

RFP Revision 1

Original Text (Cover Page)	PRIMARY REQUEST FOR PROPOSAL # 2023-RFP-101 for Audit Services
Addendum Text	PRIMARY <u>SECONDARY</u> REQUEST FOR PROPOSAL # 2023- RFP-101 for Audit Services
Justification	CSD has revised language to clarify that the RFP is a Secondary Request for Proposal, not Primary.

RFP Revision 2

Original Text (Page 4)	1.1 PURPOSE The program compliance auditing services requested for this Primary Request for Proposal (PRFP) are relevant to the California Arrearage Payment Program (CAPP), administered by the California Department of Community Services and Development (CSD). A definition of a PRFP is provided in Section 8.1.
Addendum Text	1.1 PURPOSE The program compliance auditing services requested for this Primary <u>Secondary</u> Request for Proposal (PRFP) are relevant to the California Arrearage Payment Program (CAPP), administered by the California Department of Community Services and Development (CSD). A definition of a PRFP is provided in Section 8.1.

Justification	CSD has revised language to clarify that the RFP is a Secondary Request for Proposal, not Primary.

RFP Revision 3

Original Text (Page 23)	8.1 PRIMARY RFP DEFINED The competitive method used for the procurement of services is a Request for Proposal (RFP). A <i>Primary</i> RFP, or PRFP, entails awarding the contract to the proposer who proposes the lowest cost as long as they meet the required standards. A proposal submitted in response to this PRFP will be scored and ranked based on the scoring criteria in Section 7.1.
Addendum Text	8.1 PRIMARY <u>SECONDARY</u> RFP DEFINED The competitive method used for the procurement of services is a Request for Proposal (RFP). A Primary <u>Secondary</u> RFP, or PRFP , entails awarding the contract to the <u>highest-scored responsible</u> proposer who proposes the lowest cost as long as they meet the required standards . A proposal submitted in response to this PRFP <u>RFP</u> will be scored and ranked based on the scoring criteria in Section 7.1.
Justification	CSD has revised language to clarify that the RFP is a Secondary Request for Proposal, not Primary.

RFP Revision 4

Original Text (Page 65)	Attachment 18-Glossary of Terms Electric Cooperative – As defined in Section 2776 of the Public Utilities Code. Electronic – Relating to technology having electrical, digital, magnetic, wireless, optical, electromagnetic, or similar capabilities. Electronic Signature – An electronic identifier, created by computer, attached or affixed to or logically associated with an electronic record, executed or adopted by a person with the intention of using it to have the same force and effect as the use of a manual signature. For purposes hereof, "electronic signature" shall have the meaning set forth in the California Uniform Electronic Transactions Act (" CUETA ") (Cal. Civ. Code §§ 1633.1 to 1633.17). Investor-Owned Electric Utility – This means the same as "electrical corporation" and "gas corporation" as defined in Sections 2776 and 222 of the Public Utilities Code, respectively. Publicly Owned Electric Utility – This means the same as a "local publicly owned electric utility" as defined in Section 224.3 of the Public Utilities Code. Primary Request for Proposal (PRFP) – See Section 8.1.
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	<p>Proxy Signature – When Person-A authorizes Person-B to sign Person-A’s signature on their behalf.</p> <p>Record – Information that is inscribed on a tangible medium or that is stored in an electronic or other medium and is retrievable in perceivable form. Documents or forms are records.</p> <p>Request for Proposal (RFP) – See Section 8.1.</p>
Addendum Text	<p>Attachment 18-Glossary of Terms</p> <p>Electric Cooperative – As defined in Section 2776 of the Public Utilities Code.</p> <p>Electronic – Relating to technology having electrical, digital, magnetic, wireless, optical, electromagnetic, or similar capabilities.</p> <p>Electronic Signature – An electronic identifier, created by computer, attached or affixed to or logically associated with an electronic record, executed or adopted by a person with the intention of using it to have the same force and effect as the use of a manual signature. For purposes hereof, "electronic signature" shall have the meaning set forth in the California Uniform Electronic Transactions Act ("CUETA") (Cal. Civ. Code §§ 1633.1 to 1633.17).</p> <p>Investor-Owned Electric Utility – This means the same as “electrical corporation” and “gas corporation” as defined in Sections 2776 and 222 of the Public Utilities Code, respectively.</p> <p>Publicly Owned Electric Utility – This means the same as a “local publicly owned electric utility” as defined in Section 224.3 of the Public Utilities Code.</p> <p>Primary Secondary Request for Proposal (PRFP) (RFP) – See Section 8.1.</p> <p>Proxy Signature – When Person-A authorizes Person-B to sign Person-A’s signature on their behalf.</p> <p>Record – Information that is inscribed on a tangible medium or that is stored in an electronic or other medium and is retrievable in perceivable form. Documents or forms are records.</p> <p>Request for Proposal (RFP) – See Section 8.1.</p>
Justification	CSD has revised language to clarify that the RFP is a Secondary Request for Proposal, not Primary

RFP Revision 5

Original Text (Pages 2, 4-6, 18, 20,22,23, 25-27, 29, 32, 35, 37, 65, 66)	PRFP
Addendum Text	PRFP RFP
Justification	CSD has revised language to clarify that the RFP is not a Primary RFP

RFP Revision 6

Original Text (Pages 4-5)	1.3 KEY ACTIONS AND DATES	
	DATE	KEY ACTION
	Sept 11, 2023	PRFP Available to Prospective Proposers
	Sept 20, 2023 from 1:00-3:00 p.m. PT	Bidders' Conference (Optional)
	Sept 27, 2023 at 2:00 p.m. PT	Deadline for Written Question Submission
	Oct 2, 2023 at 2:00 p.m. PT	Responses to Written Questions Posted on Cal eProcure and CSD Website
	Oct 9, 2023 before 5:00 p.m. PDT	Deadline for Protest of Requirements
	Oct 16, 2023 before 5:00 p.m. PDT.	Responses to Protest of Requirements Posted on Cal eProcure and CSD Website
	Oct 23, 2023 before 5:00 p.m. PDT	Deadline for Intent to Submit Proposal
	Oct 30, 2023 at 5:00 p.m. PT	Deadline for Proposal Submission
	Oct 31- Nov 2, 2023	Evaluation of Proposals
	Nov 3, 2023 (Estimate)	Notice of Intent to Award Posted at CSD
	Nov 10, 2023	Deadline for Letter of Intent to Protest
	DATE	KEY ACTION
	Nov 17, 2023	Deadline for written statement specifying grounds for the protest.
	Dec 1, 2023 (Estimate)	Release Contract
	Dec 15, 2023 (Estimate)	Contract Execution
Addendum Text	1.3 KEY ACTIONS AND DATES	
	DATE	KEY ACTION
	Sept 11, 2023	PRFP Available to Prospective Proposers
	Sept 20, 2023 from 1:00-3:00 p.m. PT	Bidders' Conference (Optional)
	Sept 27, 2023 at 2:00 p.m. PT	Deadline for Written Question Submission
	Oct 2, 2023 at 2:00 p.m. PT	Responses to Written Questions Posted on Cal eProcure and CSD Website
	Oct 9, 2023 before 5:00 p.m. PDT	Deadline for Protest of Requirements
	Oct 16, 2023 before 5:00 p.m. PDT.	Responses to Protest of Requirements Posted on Cal eProcure and CSD Website
	Oct 23 <u>Nov 6</u> , 2023 before 5:00 p.m. PDT	Deadline for Intent to Submit Proposal
	Oct 30 <u>Nov 13</u> , 2023 at <u>before</u> 5:00 p.m. PT	Deadline for Proposal Submission
	Oct 31- Nov 2 <u>Nov 14-Nov 28, 2023</u>	Evaluation of Proposals
	Nov 3 <u>Dec 1</u> , 2023 (Estimate)	Notice of Intent to Award Posted at CSD
	Nov 10 <u>Dec 8</u> , 2023	Deadline for Letter of Intent to Protest
	DATE	KEY ACTION

	Nov 17 Dec 15 , 2023	Deadline for written statement specifying grounds for the protest.
	Dec 1 Jan 8, 2023 2024 (Estimate)	Release Contract
	Dec 15 Jan 22, 2023 2024 (Estimate)	Contract Execution
Justification	CSD has revised the timeline to accommodate addendum changes	

RFP Revision 7

Original Text (Page 21)	<p>PHASE 3 – EVALUATION OF RESPONSE</p> <p>The top 3 highest scoring proposers with responsive proposals emerging from the Phase 2 will be evaluated by CSD for their costs for each applicable energy utility and average hourly rate. If less than 3 proposers meet the minimum threshold for Phase 2, only those meeting the minimum threshold for Phase 2 will be evaluated by CSD. An award will be made to the proposer with the lowest cost proposal.</p> <p>Proposals that earn at least 56 points in Phase 2 will be evaluated for their cost proposal. A bidder can receive a maximum of 30 additional points in Phase 3. Cost will be evaluated in the following manner:</p> <p>NOTE: We have provided a sample methodology for computing the score of the Cost Proposal. Please note that this is only an illustrative example, and you must adjust the scoring criteria and methodology to align with the requirements of the RFP you are developing.</p>
Addendum Text	<p>PHASE 3 – EVALUATION OF RESPONSE</p> <p>The top 3 highest scoring proposers with responsive proposals emerging from the Phase 2 will be evaluated by CSD for their costs for each applicable energy utility and average hourly rate. If less than 3 proposers meet the minimum threshold for Phase 2, only those meeting the minimum threshold for Phase 2 will be evaluated by CSD. An award will be made to the proposer with the lowest cost proposal highest score.</p> <p>Proposals that earn at least 56 points in Phase 2 will be evaluated for their cost proposal. A bidder can receive a maximum of 30 additional points in Phase 3. Cost will be evaluated in the following manner:</p> <p>NOTE: We have provided a sample methodology for computing the score of the Cost Proposal. Please note that this is only an illustrative example, and you must adjust the scoring criteria and methodology to align with the requirements of the RFP you are developing.</p>
Justification	CSD has revised language to clarify that the award will be made to the proposer with the highest score, not the lowest cost.

RFP Revision 8

Original Text (Page 18)	5.2 RESPONSE FORMS PART 2 <u>5.2.1. Cost Proposal</u> See Attachment 15
Addendum Text	5.2 RESPONSE FORMS PART 2 <u>5.2.1. Cost Proposal (30 POINTS)</u> See Attachment 15.
Justification	CSD has revised the Cost Proposal section to add the points possible for the cost proposal.

RFP Revision 9

Original Text (Page 21)	<p>PHASE 3 – EVALUATION OF RESPONSE</p> <p>The top 3 highest scoring proposers with responsive proposals emerging from the Phase 2 will be evaluated by CSD for their costs for each applicable energy utility and average hourly rate. If less than 3 proposers meet the minimum threshold for Phase 2, only those meeting the minimum threshold for Phase 2 will be evaluated by CSD. An award will be made to the proposer with the lowest cost proposal.</p> <p><i>Proposals that earn at least 56 points in Phase 2 will be evaluated for their cost proposal. A bidder can receive a maximum of 30 additional points in Phase 3. Cost will be evaluated in the following manner:</i></p> <p>NOTE: We have provided a sample methodology for computing the score of the Cost Proposal. Please note that this is only an illustrative example, and you must adjust the scoring criteria and methodology to align with the requirements of the RFP you are developing.</p> <p><u>Methodology:</u></p> <ul style="list-style-type: none"> <i>The lowest cost proposal receives 100 percent of the 30 possible points for Phase 3.</i> <i>The remaining proposals receive a proportionately lower percentage of the 30 possible points.</i> $\frac{\text{Lowest Proposed Cost}}{\text{Current Proposed Cost}} * \frac{30 \text{ Possible Points for Phase 3}}{1} = \text{Current Bidder's Score for Phase 3}$ <ul style="list-style-type: none"> <i>The formula is as follows:</i> <p><u>Example:</u></p> <p><i>Bidder A Total Cost: \$85,347; Bidder B Total Cost: \$90,242; Bidder C Total Cost: \$87,249.</i></p> <ul style="list-style-type: none"> <i>Bidder A: Lowest Cost Proposal (\$85,347) = 100 Percent of Possible Points</i>
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	<ul style="list-style-type: none"> • Bidder B: $\\$85,347/\\$90,242 = 94.57$ Percent of Possible Points • Bidder C: $\\$85,347/\\$87,249 = 97.82$ Percent of Possible Points <p>Points Allocation:</p> <ul style="list-style-type: none"> • Bidder A: 30 Possible Points * 100 Percent of Possible Points = 30 Points for Phase 3 • Bidder B: 30 Possible Points * 94.57 Percent of Possible Points = 28.37 Points for Phase 3 <p>Bidder C: 30 Possible Points * 97.82 Percent of Possible Points = 29.34 Points for Phase</p>
Addendum Text	<p>PHASE 3 – EVALUATION OF RESPONSE <u>COST</u></p> <p>The top 3 highest scoring proposers with responsive proposals emerging from the Phase 2 will be evaluated by CSD for their costs for each applicable energy utility and average hourly rate. If less than 3 proposers meet the minimum threshold for Phase 2, only those meeting the minimum threshold for Phase 2 will be evaluated by CSD. An award will be made to the proposer with the lowest cost proposal.</p> <p><i>Proposals that earn at least 56 points in Phase 2 will be evaluated for their cost proposal. A bidder can receive a maximum of 30 additional points in Phase 3. Cost will be evaluated in the following manner:</i></p> <p>NOTE: We have provided a sample methodology for computing the score of the Cost Proposal. Please note that this is only an illustrative example, and you must adjust the scoring criteria and methodology to align with the requirements of the RFP you are developing.</p> <p><u>Methodology:</u></p> <ul style="list-style-type: none"> • The lowest cost proposal receives 100 percent of the 30 possible points for Phase 3. • The remaining proposals receive a proportionately lower percentage of the 30 possible points. $\frac{\text{Lowest Proposed Cost}}{\text{Current Proposed Cost}} * \frac{30 \text{ Possible Points}}{\text{for Phase 3}} = \text{Current Bidder's Score for Phase 3}$ <ul style="list-style-type: none"> • The formula is as follows: <p><u>Example:</u></p> <p>Bidder A Total Cost: \$85,347; Bidder B Total Cost: \$90,242; Bidder C Total Cost: \$87,249.</p> <ul style="list-style-type: none"> • Bidder A: Lowest Cost Proposal (\$85,347) = 100 Percent of Possible Points • Bidder B: $\\$85,347/\\$90,242 = 94.57$ Percent of Possible Points

	<ul style="list-style-type: none">• Bidder C: $\\$85,347/\\$87,249 = 97.82$ Percent of Possible Points <p>Points Allocation:</p> <ul style="list-style-type: none">• Bidder A: 30 Possible Points * 100 Percent of Possible Points = 30 Points for Phase 3• Bidder B: 30 Possible Points * 94.57 Percent of Possible Points = 28.37 Points for Phase 3 <p>Bidder C: 30 Possible Points * 97.82 Percent of Possible Points = 29.34 Points for Phase</p> <table><tr><td><u>Scoring Criteria</u></td><td><u>Maximum Possible Points</u></td></tr><tr><td><u>Cost</u></td><td><u>30 Points</u></td></tr></table>	<u>Scoring Criteria</u>	<u>Maximum Possible Points</u>	<u>Cost</u>	<u>30 Points</u>
<u>Scoring Criteria</u>	<u>Maximum Possible Points</u>				
<u>Cost</u>	<u>30 Points</u>				
Justification	CSD has revised Phase 3 to clarify this is an evaluation of cost and indicate the maximum points possible.				