



CALIFORNIA ALTERNATIVE ENERGY AND ADVANCED
TRANSPORTATION FINANCING AUTHORITY

915 Capitol Mall
Sacramento, CA 95814
p (916) 651-8157
f (916) 589-2855
caeatfa@treasurer.ca.gov
www.treasurer.ca.gov/caeatfa

ADDENDUM NOTICE NO. 1

**CALIFORNIA ALTERNATIVE ENERGY
AND ADVANCED TRANSPORTATION
FINANCING AUTHORITY (CAEATFA)**

**REQUEST FOR PROPOSAL-Secondary
CONTRACT NO. CAEATFA05-18
Universal Contractor Management Services for the
California Hub for Energy Efficiency Financing (CHEEF)
Pilot Programs**

MEMBERS

FIONA MA, CPA, CHAIR
State Treasurer

BETTY T. YEE
State Controller

KEELY MARTIN BOSLER
Director of Finance

DAVID HOCHSCHILD
Chair
Energy Commission

MICHAEL PICKER
President
Public Utilities Commission

EXECUTIVE DIRECTOR
Deana J. Carrillo

March 11, 2019

The following information is provided in response to questions received by CAEATFA regarding Request for Proposal ("RFP") Number CAEATFA05-18, as shown below:

Responses to Questions:

1. **Can you advise if the bid incentives can be combined if our company meets both the small business and DVBE requirements.**

Answer:

It is possible to be eligible for the Small Business (SB) preference and the Disabled Veteran Business Enterprise (DVBE) incentive, if all factors are met. Please see Section D of the RFP for further detail regarding the preference programs.

2. **Does CAEATFA view it as a conflict of interest if the contractor manager has applied to be or is a Participating Project Developer or Participating Contractor in one or more of the CHEEF pilots? If proposer is chosen as the Provider would there be a conflict in serving both roles?**

Answer:

The CHEEF Small Business Energy Efficiency Financing Program is currently open to entities wishing to enroll as Participating Contractors or Participating Project Developers. Because the roles of Participating Contractor and Participating Project Developer are open to any and as many organizations as meet the qualifications; there is no conflict in applying for and serving in one of these roles and then applying for the Universal Contractor Manager contract. However, the organization selected as Universal Contractor Manager would not be able to continue a role as a Participating Project Developer or Participating Contractor in the Small Business or any other CHEEF program as the Contractor Manager has oversight responsibility for Contractors and Project Developers.

3. **In terms of the on-site verification component, are there requirements for verifying proper commissioning, installation standards and/or performance testing for installed EEEMs or is it simply verifying the claimed measure is installed on-site? Is the entity performing on-site verification expected to perform health and safety tests related to gas appliances?**

Addendum Notice No. 1

Request for Proposals

CAEATFA05-18

Page 2 of 3

Answer:

We are looking for verification that measures were installed as reported to the Program. Verification will take place through on-site visual inspection and confirming that the measure is able to “power on” if applicable. At times verification will take place through reviewing photos and other documentation. We are not expecting performance testing or health and safety testing. Note that the Universal Contractor Manager (“UCM”) role includes confirming that proper permits were issued and closed out.

4. Are you accepting responses for all 4 pilot programs or just for REEL and SBF at this time?

Answer:

We are looking for a comprehensive response to serve as the UCM for all four programs, recognizing that the programs are in different stages of launch.

5. Understanding that the 3rd party evaluation has yet to be completed, what in CAEATFA’s own estimation have been the strengths and weaknesses of the contractor management services provided to date for the CHEEF pilots?

Answer:

No response. As noted, this question is being considered in the current Evaluation, Measurement and Verification (“EM&V”) process.

6. Is there a template for the work plan and work schedule that should be submitted with the cost proposal, as referenced on Page 18? Page 18 says "For evaluation purposes, the cost proposal must include the proposer's budget, work plan and work schedule for the Hypothetical Scenario from Attachment 5."

Answer:

No, there are just the Cost Proposal Worksheet templates; the work plan and work schedule can be in a format determined by the proposer to best represent the service offering.

7. Is the cost proposal - annual and total cost, attachment 5 page 3 - to be exclusively for REEL and SBF programs, as included in the hypothetical scenario? Or is the cost proposal supposed to include the anticipated scope for AMF and NRE as well?

Answer:

The hypothetical cost proposal totals are just for REEL and SBF, for evaluation purposes.

8. Does the annual not-to-exceed cost requirement, in either annual flat fee or monthly billing estimates, include just the hypothetical scenarios or all services for all programs for the duration of the contract?

Answer:

The cost proposal totals are just for services from the hypothetical scenario, for evaluation purposes.

9. Section f.ii on pages 13-14 – Experience of Firm asks bidders to provide a list of contractor management services by client or transaction for the past three years as an attachment. Should we include this list under Experience of Firm or should the attachment be included at the end of the required attachments, i.e., after Attachment 15?

Answer:

The firm’s list of experience may be attached where the proposer sees fit, either within the Experience of Firm section or at the end of the proposal.

Addendum Notice No. 1

Request for Proposals

CAEATFA05-18

Page 3 of 3

10. For the REEL Hypothetical Scenario cost proposal, Contractor Training has 50 new participating contractors for Year 2, but MEO/Recruitment and Enrollment have no new contractors. Is the scenario assuming new contractors will train but not need to be recruited or enrolled?

Answer:

The hypothetical scenario has been updated and the revised text is provided in Addendum Notice No. 2 to this RFP.

The date for submitting questions regarding RFP Number CAEATFA05-18 has passed. Should you require any clarifying information regarding this addendum, the contact person for this RFP is:

Jessica Arceo
California Alternative Energy and
Advanced Transportation Financing Authority
915 Capitol Mall
Sacramento, CA 95814
(916) 651-5101
caeatfa@treasurer.ca.gov

Please note that no verbal information provided will be binding upon the State unless such information is issued in writing as an official addendum. Thank you.