

(Proposed) Request for Proposals

SOUTHERN CALIFORNIA EDISON COMPANY
Low Income Inspection Service

September 17, 1999

"This program is funded by California utility customers and administered by Southern California Edison SCE, under the auspices of the California Public Utilities Commission."

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Attachment 2 – Contractor Information Form

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1. Introduction

1.1 Overview

This Request for Proposals (“RFP”) relates to the Southern California Edison’s (“SCE”) *Evaporative Cooler Installation Program, Weatherization Program and Refrigerator Replacement Program*. Those programs are designed to assist low-income customers manage their energy use by providing energy efficient equipment and home repairs to them at no cost or for a small co-payment. Customers can reduce their energy bills by using an evaporative cooler as an alternative to an existing electric central, window, or through-the-wall air conditioning system and the energy efficient refrigerator in place of their older less efficient model. Weatherization measures, including attic insulation, caulking, weather-stripping, water heater insulation, low-flow shower heads, and minor home repairs, will help reduce electricity costs associated with space and water heating. After installation of the above appliances and/or measures, SCE requires an inspection of the installations to verify material, workmanship and safety issues. SCE will provide those inspection services through this RFP.

SCE is issuing this RFP pursuant to 2000 program designs filed with the California Public Utilities Commission (“CPUC”) on July 1, 1999, and as approved in Decision **TBD**.

The expected contract award date is _____ (Date), with contract signing expected to occur by _____ (Date). The Program will run through the end of 2000, depending on regulatory approval of the Program and funding authorization. The Program may be extended through 2001. The anticipated start date for the implementation of this Program is _____ (Date).

1.2 Terms and Conditions

The parties agree that this RFP will not establish an exclusive contract between SCE and the bidder. SCE expressly reserves all rights, including but not limited to the following: the right to utilize others to perform or supply work of the type contemplated by this RFP; the right to request proposals from others with or without requesting proposal(s) from bidders for work of the type contemplated by this RFP; and finally the unrestricted right of SCE to re-bid or perform any such work.

This RFP does not commit SCE to award a contract, to pay any costs incurred in the preparation of proposals in response to this RFP, or to procure or contract for services. SCE reserves the right to modify or withdraw the RFP, to negotiate with qualified bidders to clarify

technical or contractual issues which may arise, to reject any and all responses which are deemed incomplete and/or nonresponsive, and to terminate negotiations at any time after determining that a proposal is incomplete and/or nonresponsive.

All questions relating to this RFP must be submitted in writing to the official contact person designated in Section 3 of this RFP. All proposals must be prepared in accordance with the requirements discussed in Section 3. All costs of preparing and submitting proposals will be borne by bidders. Bidders will also bear any costs incurred during negotiations preceding the execution of a contract relating to this solicitation.

1.3 Eligibility

Organizations and individuals with knowledge of and experience with installation of evaporative coolers, weatherization measures, and refrigerators, and inspections of such installations are eligible to respond to this RFP individually, jointly or as a part of a team of bidders, subject to the following specific eligibility criteria:

- Members of the Low income Governing Board or the California Board for Energy Efficiency are not eligible to respond to this RFP individually, jointly or as part of a team.

To be considered eligible to bid in response to this RFP, the bidder or a team must also satisfy four additional conditions:

- It must have demonstrated skills and experience in performing installations or inspections similar to the type of work requested in this RFP.
- It must have sufficient financial strength to implement its proposal.
- It must receive favorable references from previous clients in the area covered by its proposal.
- It cannot be the contractor chosen or subcontracted to **install** evaporative coolers, refrigerators or weatherization measures in conjunction with SCE's or Southern California Gas Company's low income assistance programs.

It is within SCE's sole judgement to determine whether an individual or bidding team meets these eligibility criteria. Any proposal submitted by an individual or team that does not meet the eligibility criteria listed above shall be rejected without review.

1.4 Schedule

The schedule for this solicitation is shown below in Table 1. The dates commence on the effective date of the CPUC's decision approving SCE's low-income program plans and this RFP.

Table 1

Event	Deadline (Business days after CPUC approval)
Request for Proposals Issued	8 days
Deadline for Intent to Bid	12 days
Deadline for Written Questions	15 days
Deadline for Responses to Questions	20 days
Deadline for Receipt of Proposals	34 days
Interviews with Short-Listed Contractor(s) (if needed)	39 days
Selection of Implementation Contractor(s)	44 days
Signing of Contract by Implementation Contractor(s)	51 days
Signing of Contract by SCE	61 days
Start of Implementation of Program	71 days

1.5 Organization of the RFP

The remainder of this RFP is organized as follows:

- Section 2 describes the services to be provided by the successful Contractor(s);
- Section 3 provides detailed instructions for preparing a proposal in response to this RFP.
- Section 4 enumerates and explains the criteria that will be used to evaluate proposals.
- Various other documents and forms pertinent to preparing a response to this RFP are presented in Appendix A and B and Attachments 1 through 7.

Intent to Bid Form (optional)

Use the Intent to Bid form in **Attachment 1** to indicate your intent to bid and to receive additional information from SCE regarding this solicitation. The form may be returned to SCE by mail or fax. The intent to bid information may also be provided to SCE by e-mail at: _____ Receipt of e-mails will be acknowledged by return e-mail.

2. Statement of Work

2.1 Overview

SCE is seeking a Contractor(s) to provide Inspection services throughout its entire service territory to all of the low income customers who receive new evaporative coolers and/or refrigerators installed in their homes. Additionally, a small percentage of homes weatherized in conjunction with a cooperative with Southern California Gas Company (“SoCalGas”) will also be inspected. This section describes the specific services to be provided by the Contractor(s).

2.2 Work Summary

The work includes the following elements:

1. Contractor shall provide all qualified personnel (Inspectors), materials, tools, uniforms, and equipment to perform inspections of evaporative coolers, weatherization repairs and refrigerators.
2. Contractor shall provide an “in house” employee (Scheduler).
3. Contractor’s employees assigned to perform services under this contract shall be trained in “Inspection Procedures” by the Contractor.
4. Contractor shall complete **all** inspection jobs referred to them by SCE within fifteen (15) working days from the date dispatched.
5. Contractor shall report services according to SCE procedures.

2.3 Contract Length

This Program is intended to be a two-year program. It is SCE’s intention that the Program run through December 2001, and that any contract arising from this solicitation will cover the entire Program term. The contract will provide for annual renewals and will allow SCE the right to terminate for cause. Annual renewals will be contingent upon CPUC approval and appropriation of funds for the Program.

2.4 Inspections of Evaporative Coolers, Weatherization Repairs and Refrigerators

Contractor shall provide all labor, materials, tools, uniforms, and equipment to perform inspections of evaporative coolers, weatherization repairs and refrigerators installed by other LIEE contractors. Inspection criteria are listed in **Appendix A**.

Contractor shall provide sufficient qualified personnel (Inspectors) to complete all jobs in a timely manner.

2.5 Inspection Services

Contractor shall provide an “in house” employee (Scheduler) to be responsible for contacting customers, scheduling inspections, coordinating travel arrangements for Inspectors (if necessary), and forwarding daily routes to Inspectors. Contractor shall complete **all** inspection jobs referred to them by SCE within fifteen (15) business days from the date dispatched. Should a situation arise preventing completion on an inspection within the fifteen (15) day time frame, Contractor will notify SCE in writing of their need to retain job(s) for an additional fifteen (15) business days. At no time will Contractor hold jobs longer than thirty (30) business days. SCE reserves the right to deny payment for any jobs completed and returned more than forty-five (45) business days after referral by SCE. Documentation of all completed inspections (Evaporative Cooler, Weatherization, and Refrigerator Inspection Reports) must be submitted to SCE within five (5) working days from date of inspection. SCE reserves the right to reject any invoices accompanied by untimely documentation.

2.6 Hazardous Condition Reporting

Contractor (Inspector) shall immediately notify SCE when an inspection reveals any type of hazardous condition in a customer’s home that was caused by an installation contractor retained by SCE or SoCalGas. Contractor should notify the customer of any other hazardous conditions discovered during an inspection of a residence.

2.7 Disputed Results

Should an installation contractor contest the results of an inspection performed by Contractor, and it is later determined by SCE that Contractor’s original inspection results were not accurate, Contractor agrees to pay a reasonable fee, to be determined by SCE, to compensate the installation contractor for expenses unnecessarily incurred to revisit the site (“trip charge”). Contractor will be billed monthly, by SCE, for all applicable “trip charge” fees.

2.8 Customer Service Standards

Contractor shall adhere to quality customer service practices. Quality practices include, but are not limited to, keeping all appointments with customers, ensuring good customer service and customer satisfaction with work performed, and responding to customer complaints. Smoking and the drinking of alcoholic beverages will not be allowed on any customer premises. SCE or its designated agent may periodically audit Contractor’s work.

Contractor’s employees or subcontractors are required to wear a uniform, which, shall as a minimum, include safety shoes, long pants, a Contractor provided shirt and ID badge, if available, and an ID badge to be provided by SCE.

SCE or its designated agent may perform audits of Contractor's work.

2.9 Geographic Scope

The inspection services will be provided throughout SCE's service territory as defined by the ZIP Code list in **Attachment 4**. Bidders may bid on all or some of the zip code areas. If the entire service territory is not covered by any combination of acceptable bidders, SCE reserves the right to assign zip code areas to the most convenient bidder at the same rates bid by that bidder. Likewise, if a bidder who has bid for multiple zip codes loses the bid for one or more zip codes, that bidder may receive a contract for the other zip codes at the original price proposed.

2.10 Other Tasks

The successful bidder will be responsible for performing the following tasks.

A. Kickoff Meeting

The Contractor will attend a kickoff meeting with SCE's Program Manager within ten (10) working days after contract signing. The purpose of the meeting will be to clarify issues relating to scheduling, management and coordination, reporting procedures and contractor payments.

B. Reports

The Contractor will be responsible for keeping records on all inspection activities, and these records must be made available to SCE on a timely basis. Contractors will use forms provided by, or approved by, SCE when submitting work completed for payment.

2.11 Payment of Contractor(s)

Contractor(s) will be paid thirty (30) days after receipt of an invoice approved by SCE's Program Manager. The invoice shall include the inspection sheets for all work performed during the period. Invoices shall be submitted monthly or more frequently with the approval of SCE's Program Manager and/or Accounts Payable department.

2.12 Invoicing

Invoices shall be submitted to SCE accompanied by copies of the Inspection report signed by the customer who resides at the home that was inspected.

3. Proposal Instructions

3.1 Overview/Submittal of Proposals

This section outlines the procedures to be followed in this solicitation process. The bidder is responsible for reading and following these provisions. All communications regarding this RFP must be conveyed in writing to:

Southern California Edison
GO-3 1st Floor
2131 Walnut Grove Avenue
Rosemead, CA 91770
Attention: _____

All revisions to this RFP will be made in writing by SCE.

3.2 Schedule

The schedule for this solicitation is provided in Table 1 in Section 1.4.

3.3 Written Responses to Questions

All questions submitted in writing by _____(Date) will be answered by SCE in writing by _____(Date). Questions may also be submitted via fax or via e-mail.

Southern California Edison
Attention:
Fax:
e-mail address:

Responses will be sent to all parties who have indicated that they will submit a proposal by returning the Intent to Bid Form in **Attachment 1** or who have notified SCE of intent to bid through other written or electronic means.

3.4 Submission of Proposals

Proposals must be **received** by SCE no later than 4:30 p.m. on _____ (Date). Proposals received after this deadline may not be considered at SCE's sole discretion. Bidders are encouraged to take all necessary steps to ensure that proposals are received on time.

One unbound original and three (3) bound copies and a complete electronic version on a 3-1/2" high density diskette in Microsoft Word format must be submitted in a sealed envelope or carton to:

Southern California Edison
GO-3 1st Floor
2131 Walnut Grove Avenue
Rosemead, CA 91770
Attention: _____

The outside envelope of your proposal should be labeled clearly as follows:

Low Income Inspection Services

Proposals must be prepared according to the instructions provided below in this section.

Proposals are prepared at the bidder's expense. SCE assumes no liability for any expenses associated with preparation or delivery of any proposal.

3.5 Initial Bid Screening

SCE will review bids to ensure that directions have been followed and that required information has been included. SCE will notify bidders who have made errors or omissions that can be easily corrected. These bidders will be given three (3) business days to submit corrections to the address shown for submission of proposals. After this process, proposals that fail to meet minimum criteria for completeness will be eliminated from further considerations.

3.6 Interviews with Short List

If considered necessary by SCE, the top-ranked bidders will be interviewed. If required, interviews will be scheduled for the period _____ to _____ (Dates). The interviews will focus on clarifying proposals, rather than offering bidders an opportunity to revise proposal terms.

3.7 Selection of the Inspection Contractor(s)

SCE will select one or more contractor(s) for the Program and will notify the selected contractor(s) in writing by _____ (Date). SCE and the winning bidder(s) will sign a contract within seven (7) days after the date the winning bidder accepts the award. A sample contract is attached [AFTER CPUC approval].

A contractor may commence work after receipt of a contract that has been executed by SCE and that contractor, and inspection referral forms have been received by the contractor.

3.8 Proposal Instructions

3.8.1 Format for Proposals

Bidders are required to submit proposals which consist of two parts: (1) a technical proposal and (2) a price proposal.

A. Technical Proposal Information

The *Technical Proposal* section should include the following: (1) a summary of the offer, (2) a detailed statement of work, (3) a description of the bidder's proposed management structure, (4) a description of the qualifications and experience of the management team and staffing plan, (5) description of prior experiences with SCE, if any, and (6) appendices. These elements of the proposal are discussed below.

Section 1: Summary of Offer. The proposal must include a brief summary of the key elements of the proposal. The summary should include the following:

- The geographic areas covered by the proposed program;
- The contractor's business history;
- The contractor's qualifications;
- And the primary elements of the Program.

Section 2: Statement of Work. Provide a detailed plan for conducting the inspections. The Statement of Work should describe the ways in which the following tasks will be performed:

Task 1. Kickoff Meeting. The first project task will entail attending a kickoff meeting at SCE's offices in Rosemead or Irwindale, California on _____ (Date). The purpose of the meeting will be to clarify issues relating to scheduling, project management, coordination, and contractor payments. The bidder should indicate its availability to attend the kickoff meeting and identify all personnel who will attend the meeting.

Task 2. Refrigeration Inspection Services. The bidder should discuss the specifics of how the inspection service shall meet all the requirements to inspect refrigerator installations in the geographic areas selected by the bidder (see **Appendix A**).

Task 3. Evaporative Cooler Inspection Services. The bidder should discuss the specifics of how the inspection service shall meet all the requirements to inspect evaporative cooler installations in the geographic areas selected by the bidder (see **Appendix A**).

Task 4. Weatherization. The bidder should discuss the specifics of how the inspection service shall meet all the requirements to inspect the various measures provided in the Weatherization program in the geographic areas selected by the bidder (see **Appendix A**).

Task 5. Reporting. The bidder should confirm his understanding of the reporting system required by SCE.

Section 3: Management and Staffing Plan. This section should identify all organizational team members (management and non-management). The staffing plan should identify key personnel and describe their primary responsibilities. Qualifications of individual key personnel should be summarized. Bidder should also describe the means of coordinating activities, achieving inspection completions, and communicating with SCE Program Manager.

Section 4: Qualifications, Experience, and References. This section should describe the bidder's experience with inspection/and or delivery of weatherization, refrigerator and evaporative cooler installations or similar work. References should be provided for each of these areas of performance.

Section 5: Inspection. Identify all contracts entered into with SCE during the past 5 years. Include a brief description of the nature of the work, the contract amount, the status of the work (ongoing or completed), and any significant problems or disputes which arose between the contracting parties. Identify any actual or potential conflicts of interests with any of the participating utilities.

Appendices. Appendices should include resumes for all key program staff, examples of prior work in the areas of appliance installation and inspections and letters of commitment from subcontractors (if applicable).

B. Price Proposal Information

The *Price Proposal (Attachment 5)* should contain a complete explanation of the proposed prices of the individual inspections. Prices should be provided for refrigerator, evaporative cooler and weatherization inspections separately. The price for Weatherization inspections should be based upon the inspection of each customer location. Preference will be given to fixed price per inspection.

Refrigerator Inspection Services

The bidder shall provide a fixed price for each refrigerator inspection within its proposed service area. The price shall include all costs involved in the inspection such as mileage, labor, overhead, and miscellaneous travel expenses. The price shall be a fixed price with no additional costs to be charged to SCE.

Evaporative Cooler Inspection Services

The bidder shall provide a fixed price for each evaporative cooler inspection within its proposed service area. The price shall include all costs involved in the inspection such as mileage, labor, overhead, and miscellaneous travel expenses. The price shall be a fixed price with no additional costs to be charged to SCE.

Weatherization Inspection Services

The bidder shall provide a fixed price for each weatherization inspection within its proposed service area. The price shall include all costs involved in the inspection such as mileage, labor, overhead, and miscellaneous travel expenses. The price shall be a fixed price with no additional costs to be charged to SCE.

3.8.2 Other Requirements

A. Signature Required. The proposal and accompanying documents must each be signed by a person authorized to commit the contractor to the terms of the proposal. The original signed pages should be included in the unbound copy of the proposal. Failure to sign the proposal as required may result in rejection of the proposal.

B. Contractor Data. Bidders must complete and sign the Contractor Information form in **Attachment 2** and include it in their proposal package. Bidders must also submit a Contractor Profile/Proposal which is presented in **Attachment 3**. Bidders additionally must submit

a Price Proposal which is presented in **Attachment 5**. Lastly, bidders must submit a Subcontracting Plan which is presented in **Attachment 7**.

3.9 Confidential Information

Proposals, including copies and supporting documents submitted in response to this RFP, shall become the property of SCE. Information provided in the proposal package may be made available to the public. SCE will make reasonable efforts to protect any information clearly indicated as confidential by bidders. Confidential information must be clearly identified and designated as “**Proprietary**” or “**Confidential**” on each page where sensitive or confidential information appears in the proposal. Upon prior notice to the bidder, confidential information may be made available to the CPUC. Required information withheld from proposals due to confidentiality claims may result in disqualification of the bid.

4. Proposal Evaluation Criteria

4.1 Overview

The evaluation process will consist of three steps:

1. Review of all proposals to identify bids deemed to be nonresponsive;
2. Scoring of all responsive proposals; and
3. Ranking the proposals based on the numerical scores.

In order for a proposal to be considered responsive, it must meet the following minimum requirements:

- It must propose services that meet the requirements specified in Section 2.
- It must follow the proposal preparation instructions given in Section 3.
- It must be submitted by a team with adequate experience in performing inspections and/or installation of electromechanical appliances and weatherization work.

SCE will notify bidders who have made errors or omissions that can be easily corrected, and these bidders will be given three days to submit corrections. After this grace period, proposals failing to meet the minimum requirements will be eliminated from further consideration.

4.2 Scoring Proposals that Meet Minimum Requirements

Proposals will be scored on a 100 point system based on: (a) the proposed price, and (b) other components such as the viability of the proposed service. The qualifications of the Contractor and its team, and the design of the management plan.

These criteria are discussed below.

4.2.1 Price Component - Total Possible Score: 50 Points

The price component will be calculated by totaling two scores:

- Raw price score
- Competitive price ranking.

The bid price for each measure below will be ranked from highest to lowest for all bidders as follows:

- Refrigerator Inspection
- Evaporative Cooler Inspection
- Weatherization Inspection

Raw price score

- The total number of bidders will be divided by **XX**. This will become the **points per bidder**.
- The bidders will be ranked on the basis of their **Total Bid Price**. The bidder having the highest **Total Bid Price** will be **assigned the number 1**. The next highest bidder will be **assigned number 2**, and so on.
- The **Raw Point Score** is calculated by multiplying the **points per bidder** by the **assigned number**.

Competitive Price Score

Each bidder's **Total Bid Price** for each measure will be totaled and divided by the number of bidders to calculate **Average Bid Price**.

The percent difference between each bidder's **Total Bid Price** and the **Average Bid Price** will be calculated.

Each bidder will receive points for their percent difference.

The total of the Raw Price Score and Competitive Price Score will comprise the Price Component Score for each bidder.

4.2.2 Other Components - Total Possible Score: 50 Points

The other components score will be calculated by totaling one score for each of the following:

1. Demonstrated experience delivering programs and services to low-income populations for the following:

Program or Service

Weatherization installation and inspection
Evaporative Cooler installation and inspection
Refrigerator installation
Appliance repair and maintenance

2. Demonstrated knowledge of targeted low-income communities.
3. Demonstrated ability to reach targeted low-income communities.
4. Demonstrated ability to utilize and employ local residents in the inspection Program.
5. Demonstrated ability to provide local job training in the inspection Program.
6. other Attributes that benefit local communities where the inspection Program is to be offered.
7. Number of years of experience providing services to low income communities.
8. Number of years of experience providing residential installation or inspection of weatherization.
9. Financial/Credit reporting

SCE will obtain a Dun & Bradstreet (“D&B”) company report to establish scoring on financial background credit. If a D&B report is not available, a payment history for all debts incurred in the last year and the most current financial data including a Balance Sheet and Income Statement will be considered.

10. Contractor Performance

Bidder must provide a photocopy of its California State Contractors License Board “wallet card” to verify its license number and expiration date. The California State License Board will be contacted to ascertain whether complaints are pending against the bidder.

4.3 Right to Reject

SCE reserves the right to reject any or all proposals submitted in response to this RFP, if they are deemed untimely, incomplete and/or nonresponsive.