

(Proposed) Request for Proposals

**SOUTHERN CALIFORNIA EDISON COMPANY
EVAPORATIVE COOLER INSTALLATION
PROGRAM**

September 17, 1999

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

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1. Introduction

1.1 Overview

This Request for Proposals (“RFP”) relates to the Southern California Edison’s *Evaporative Cooler Installation Program* (hereinafter “Program”), which is one of several Low Income Energy Efficiency (“LIEE”) programs. The Program is designed to assist low-income customers better manage energy use in summer months by offering an evaporative cooler as an alternative to an existing electric central, window, or through-the-wall air conditioning system. Low-income customers are those whose household income meet guidelines established by the California Public Utilities Commission (“CPUC”). Southern California Edison (“SCE”) collects a small co-payment from low-income customers who participate in the Program.

In addition to installing evaporative coolers, contractor(s) will be required to provide the following services, as applicable, which are described in detail in this RFP:

1. Installation of compact fluorescent bulbs inside a residence;
2. Replacement of a porch light fixture, if applicable; and
3. Energy education, including assisting customers to complete an application to receive a bill discount under the California Alternate Rates for Energy (CARE) program.

SCE is issuing this RFP pursuant to 2000 program designs filed with the 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 the Program is _____, 2000.

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.

SCE reserves the right 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 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 bidding 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 proposed in response to 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.
- Contractor must possess an active California Class C-20, warm air heating, ventilating, and air-conditioning license.

It is within the 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 Contractors (if needed)	39 days
Selection of Contractors	44 days
Signing of Contract by Contractor(s)	51 days
Signing of Contract by SCE	61 days
Start of Implementation of Program	71 days

1.5 Organization of this RFP

The remainder of this RFP is organized as follows:

- Section 2 describes the Program and discusses 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 this RFP are presented in Appendices A through J and Attachments 1 through 6.

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, if any. 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. Description of the Program

2.1 Program Design Summary

The Program includes the following elements:

1. Installation of an evaporative cooler;
2. Installation of compact fluorescent bulbs inside a residence;
3. Installation of a compact fluorescent bulb in a porch light fixture or replacement of the porch light fixture, if eligible;
4. Energy education; and
5. Completing a SCE program survey.

2.2 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 covers the Program term. The contract will provide for annual renewals and will allow SCE to terminate the agreement for cause. Annual renewals will be contingent upon CPUC approval and appropriation of funds for the Program.

2.3 Program Tasks

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

Task 1. Receiving Customer Referrals and Scheduling Evaporative Cooler Installations

SCE customers apply for the Program by calling SCE's toll-free number: (800) 736-4777. SCE determines customer eligibility, then sends the names and addresses of eligible customers to the selected contractors.

To be eligible, a customer must have a working window, wall, or central air conditioner and must meet income guidelines for the Program. **The Program is only available to homeowners. Renters are not eligible. (SCE has asked the CPUC to rescind this rule so it is subject to amendment.)**

Customers are referred to contractors based on an assigned area defined by postal Zip Codes. These customer referrals will be provided on a continuing basis throughout the year but SCE will not guarantee a minimum number of referrals. To assure adequate coverage, SCE may assign more than one contractor to work specific areas, especially those areas where

installation potential is high. A list of Zip Codes where evaporative coolers are eligible for installation is presented in **Appendix A**.

Once a contractor receives a referral, the contractor is required to contact the customer within ten (10) working days to schedule an appointment for installation. Incomplete referrals (beyond 30 days) may be reassigned to another contractor.

Contractors may also solicit participation in the Program and submit customer names to SCE for eligibility screening and return to the contractor for installation.

Task 2. Receiving and Storing Evaporative Cooler Inventory

SCE will bulk purchase a standard evaporative cooler suitable for a window or through-the-wall installation. **Appendix B** provides a drawing and specifications of the cooler that has been previously installed. **Note that SCE proposes to re-bid its evaporative cooler purchases for year 2000 so the evaporative cooler specifications may change from those provided in Appendix B.**

The coolers will be shipped to contractors directly from the manufacturer complete with all components necessary for operation, including motor (wired to plug into existing household outlets), duct, grill, air-tight grill cover, chain sets, and other miscellaneous hardware. Shipping costs will be paid by the manufacturer.

Contractors must provide a secure site to store approximately 50-100 evaporative coolers and must insure the inventory. Coverage should include, but is not limited to, theft, fire, vandalism, and damage. SCE will inspect storage facilities and verify that cooler inventory is insured and in a secured location. If the contractor fails to comply with this provision, the contractor shall, at his own cost, replace damaged or lost coolers or reimburse SCE to the extent that SCE would have been protected had the contractor complied with this provision.

Hardware necessary to install coolers must be provided by the contractor. This includes copper water supply lines, water shut-off valves, and materials required to finish an installation (wood trim, caulking, plastic sheeting, etc.).

Task 3. Installation of the Evaporative Cooler, Collecting Co-Payment, Passing Post-Installation Inspection, and Warranty

SCE customers receiving an evaporative cooler will be required to make a co-payment of \$40.00 to help defray the costs of the Program. This amount will be collected by contractors before the installation is performed. It can be in the form of cash, a cashier's check, or money

order. The customer will be informed by SCE that contractors will collect the co-payment before installing the cooler. This payment will be retained by the contractor as an offset to the total installation price to SCE.

Contractors must install the evaporative cooler in accordance with installation criteria specified in **Appendix C**. Contractors may decline to install an evaporative cooler due to structural problems or unforeseen or unsafe circumstances. Contractors may not subcontract any portion of this Program unless prior approval is obtained from an authorized SCE representative. See **Appendix D** for information concerning subcontracting.

If a jurisdiction (city or county) requires permits for electrical work, plumbing, or mechanicals, contractors are responsible for obtaining the permits **before** installing a cooler. Contractors will be reimbursed for the cost of permit(s) by SCE.

Contractors will furnish the customer with a written contract detailing the job to be performed, certifying that all applicable requirements for installation criteria and material standards will be met, and guaranteeing to promptly correct any deviation from the installation criteria without cost to the customer or SCE.

Contractors will not be authorized to solicit on SCE's behalf for any improvements **other than the specified installation of an evaporative cooler**. SCE will not be financially responsible for any other improvements that are agreed to by the contractor and the customer. Other improvements must be contained in a separate agreement between the contractor and the customer, be invoiced separately, and must not be a precondition to having an evaporative cooler installed under this Program.

Contractors will be responsible and solely liable for all aspects of the installation of the coolers, all acts and omissions of employees, subcontractors or agents. Contractors must agree to participate in good faith in conciliation conferences in the event that a complaint is made by an eligible customer concerning the installation services.

At the conclusion of the installation, contractor must complete a checklist to document that certain installation criteria were followed. The contractor and customer must both sign the form. An example of the checklist is presented in **Appendix E**.

SCE will inspect each evaporative cooler installation and will require the contractor to correct defects prior to payment for work performed. The inspector will also verify the items shown on the installation checklist.

Contractors will provide a **one-year warranty** for workmanship and materials, and correct any installation problem or deviation from installation criteria or violation of applicable regulations within a reasonable period of time.

SCE will provide replacement motors, pumps, float valves, control knobs, and switches for manufacturer warranty repairs. Contractors will be provided an inventory of these items

based on anticipated need. **NEITHER SCE, NOR THE EVAPORATIVE COOLER MANUFACTURER, WILL REIMBURSE CONTRACTORS FOR ANY WARRANTY WORK.**

Task 4. Installation of compact fluorescent bulbs inside a residence

SCE offers low-income customers free compact fluorescent bulbs (“CFBs” or lightbulbs) to replace incandescent bulbs in a residence. The CFBs provide approximately the same amount of light as an incandescent bulb, but at a lower wattage. SCE will purchase the CFBs directly from manufacturers and have the inventory shipped to contractors for installation in residences.

SCE will screen customers for eligibility for CFBs while screening for eligibility to receive an evaporative cooler. If a customer is eligible to receive CFBs, contractors will be notified at the same time they receive evaporative cooler referrals.

At the time of an evaporative cooler installation, contractors will help a customer select locations to install up to four CFBs and then install them.

An example of the types of CFBs provided by SCE is presented in **Appendix F**.

Task 5. Installation of a compact fluorescent bulb in a porch light fixture or replacement of the porch light fixture, if eligible.

SCE also offers low-income customers a free CFB to replace an incandescent bulb in an outdoor porch light fixture. The CFBs provide approximately the same amount of light as an incandescent bulb, but at a lower wattage.

SCE will determine eligibility for porch light CFBs while screening for eligibility for evaporative coolers and interior CFBs. If a customer is eligible to receive a porch light CFB, contractors will be notified when they receive evaporative cooler referrals.

At the time of an evaporative cooler installation, contractors will replace an incandescent porch light fixture bulb if the residence has one. If the fixture will not accept a CFB, or the bulb would not be adequately protected from the elements, a new hard-wired fixture using a CFB will be installed (unless new wiring is required). As in relamping, described in Task 4, SCE will purchase CFBs and hard-wired fixtures using CFBs directly from manufacturers and have them shipped directly to contractors for installation.

An example of the types of hard-wired fixtures using a CFB provided by SCE is presented in **Appendix G**.

Task 6. Energy Education

SCE offers energy education to all low-income customers participating in the Program. This is provided in an energy education packet which contains the following items:

1. An Application for the California Alternate Rates for Energy (CARE) Program. The application allows eligible customers to receive a 15% electricity rate discount.
2. "Helpful Programs" Brochure. This brochure gives information in six languages (English, Spanish, Chinese, Cambodian, Vietnamese, and Korean), on SCE and various community programs which offer assistance to low-income customers.
3. "Bright Ideas" Brochure. This brochure gives information in the same six languages and in cartoon form on electrical safety and proper use of electricity.
4. "The Official Kite Safety Book." This comic book for children is written in English and Spanish, and has information on all kinds of electrical safety — not just kites.
5. "Smart Ideas on Conservation" Brochure. This brochure provides energy conservation information (English only).
6. A referral card in English and Spanish. This card gives 800 numbers for the Energy Use Profile and In-Home Energy Survey programs run by SCE's Customer Service department.
7. "Energy Conservation Tips" brochure. A brochure in English and Spanish which provides helpful information on conserving energy.

Contractors will explain the materials in the packet to customers at the time they install the evaporative coolers.

When SCE screens a customer for eligibility for an evaporative cooler, eligibility for CARE will also be determined. To participate, customers must complete an application and sign it, certifying that they meet the income guidelines for CARE. If a customer is eligible to apply for CARE, contractors will be notified when they receive evaporative cooler referrals and will be required to assist interested customers with completing the CARE application. An example of the current CARE application is presented in **Appendix H**.

Task 7. SCE Program Survey

SCE has a Refrigerator Replacement Program which offers free, energy efficient refrigerators to a limited number of qualified customers who own their principal refrigerator. Although all Evaporative Cooler Program customers are eligible for the Refrigerator Replacement Program, not all qualified customers will receive one due to limited funding. To identify potential eligible customers for a new refrigerator, SCE requires contractors to complete a survey form containing five simple questions for each customer.

At the time of an evaporative cooler installation, contractors will ask the customer to answer the questions on the survey form. An example of the SCE program survey is presented in **Appendix I**.

Task 8. Completing Program Documentation

Contractors will be responsible for completing a LIEE Program Application to document program services provided to each customer.

An example of the LIEE application is presented in **Appendix J**.

2.4 Payment of Contractor(s)

Contractor(s) will be paid thirty (30) days after receipt of an invoice approved by SCE's Program Manager. Invoices shall be submitted monthly or more frequently with the approval of SCE's Program Manager and/or Accounts Payable department.

2.5 Invoicing

Invoices shall be submitted to SCE accompanied by the following documentation:

- Photocopy of the building permit(s) and receipt(s), if any, and/or a waiver(s) from the local jurisdiction;
- Installation Checklist;
- SCE Program Survey;
- Copy of completed LIEE Program Application; and
- Copy of installation proposal/contract contractor given to the customer.

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 shown in the table 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.

SCE

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 (**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 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:

Evaporative Cooler Installation Program

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 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 consideration.

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 _____, 1999 (*Date to Date*). The interviews will focus on clarifying proposals, rather than offering bidders an opportunity to revise proposal terms.

3.7 Selection of the Winning Bidder(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) calendar days after the winning bidder(s) 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.

3.8 Proposal Instructions

Bidders are required to submit a proposal which contains the following sections: (1) a contractor information form and contractor profile/proposal, (2) a price proposal, (3) a Zip Code area proposal, (4) a Subcontracting Plan, and (5) a description of previous contracts with SCE.

A. Contractor Profile/Proposal

The Contractor Information Form and Profile/Proposal are presented as **Attachments 2 and 3**, respectively. They ask for information regarding the contractor that will be used to evaluate qualifications to perform services for the Program.

B. Price Proposal

The Price Proposal is presented as **Attachment 5**. It asks for unit pricing for the following:

- Unit price to install a window-mounted evaporative cooler.
- Unit price to install a through-the-wall mounted evaporative cooler.
- Unit price to install up to four compact fluorescent bulbs in a residence.
- Unit price to install a compact fluorescent bulb in an outdoor porch light fixture.
- Unit price to replace a hard-wired outdoor porch light fixture with a new compact fluorescent fixture.
- One unit price to do all of the following: (1) explain the Energy Education packet, (2) assist a customer in completing the California Alternate Rates for Energy (CARE) application, and (3) complete the SCE Program Survey.

Unit prices must be the same for all Zip Code areas bidders desire to serve.

C. Zip Code Area Proposal

The Zip Code Area Proposal is presented as **Attachment 4**. It asks for bidder's proposal for areas in which services would be provided at the bid unit prices.

D. Subcontracting Plan and Reporting Requirements

The Subcontracting Plan and Reporting Requirements is presented as **Attachment 5**.

E. Description of Previous Contracts with SCE

The bidder shall provide a short description of all contracts entered into between the bidder and SCE within the past five (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 interest with any of the participating utilities.

3.9 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.

3.10 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 non-responsive;
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, a proposal 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.

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 requirement 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 Price Proposal and (b) the Contractor Profile/Proposal information. These criteria are discussed below.

4.2.1 Price Proposal - Total Possible Score: 50 Points

The price component will be calculated by totaling two scores:

- Raw price score
- Competitive price score.

Raw Price Score

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

Evaporative Coolers Bid Price

- Unit price to install a window-mounted evaporative cooler.
- Unit price to install a through-the-wall mounted evaporative cooler.

Other Bid Prices

- Unit price to install up to four compact fluorescent bulbs in a residence.
- Unit price to install a compact fluorescent bulb in an outdoor porch light fixture.
- Unit price to replace a hard-wired outdoor porch light fixture with a new compact fluorescent fixture.
- One unit price to do all of the following: (1) explain the Energy Education packet, (2) assist a customer in completing the California Alternate Rates for Energy (CARE) application, and (3) complete the SCE Program Survey.

Because historically window-mounted coolers represent 75% of installations and through-the-wall mounted coolers represent 25% of installations, these unit prices will be multiplied by these percentages before adding them into the total for all measures.

The equation for calculating the bid price will be as follows:

$(\text{Window-mounted price} * 75\%) + (\text{Through-the-wall mounted price} * 25\%) + \text{Other prices} = \text{Total Bid Price}.$

- 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**, etc.
- 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 Proposal Score for each bidder.

**4.2.2 Contractor Profile/Proposal - Total Possible Score:
50 Points**

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

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

Program or Service

Weatherization
Evaporative cooler installation
Appliance repair and maintenance
Energy education
Outreach and enrollment services
Bill payment assistance

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 Evaporative Cooler Installation Program.
5. Demonstrated ability to provide local job training in the Evaporative Cooler Installation Program.
6. Other attributes that benefit local communities where the Evaporative Cooler Installation 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 evaporative cooler installation.

9. Financial/Credit reporting:
Dun & Bradstreet (“D&B”) company report, if available. 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 (based on references)

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

11. Bidder’s implementation and ongoing management plan for the Evaporative Cooler Installation Program.

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.