

2022 Distributed Energy Resources RFP:

Exhibit C. Proposal Requirements for Category B

EXHIBIT C: PROPOSAL REQUIREMENTS FOR CATEGORY B***Exhibit C: Proposal Requirements for Category B*****Introduction**

Respondents to Category B, detailed in Section 3 of the RFP, should submit a proposal that addresses each of the below Sections, must be submitted in the order outlined below, and must adhere to the page limitations. Page limitations designate maximum length, responses may be shorter. Proposals that do not follow this format are at risk of being disqualified. If a template is provided as an Exhibit, the same format must be used for the related section. Please place company name and the page number on each page.

Written response should demonstrate market readiness for an innovative idea and provide additional detail on the need for the program, capacity/energy sources and/or estimates (where applicable), data which supports the need for the new approach, and any best practices or examples from other utilities implementing similar programs.

Section I - Summary Information

- Proposal Cover Letter (1 page)
- Executive Summary (1 page)
- IT Security Questionnaire – See Exhibit N (1 page)

Section II – Company Overview

- Company Profile, as described in Table 1
- History & Overview of Company Products and Services (2 pages)
- Company Qualifications (2 pages)
 - General description of the organization, background and experience in programs similar to the proposal, including experience in communities in PSE's service area
 - Resume of respondent's program manager and others being proposed for the program team (as applicable). One paragraph maximum per individual, full resumes may be included as an attachment to the proposal.
 - If Company or key management team members have worked with any similar organizations which provided similar services to those listed in the proposal, provide a list of prior organizations, with a focus on local organizations. Specifically note any services provided to PSE or its predecessors.
 - Describe top distinctions between company and others providing a similar function to the market.
- References (3 pages)
 - Provide three references from current or past clients for whom company has provided similar programs in the last 3 years. (References will be contacted for short-listed respondents only.)

EXHIBIT C: PROPOSAL REQUIREMENTS FOR CATEGORY B

- References may also include customers for whom the respondent has provided services similar to those included in the proposal.
- Reference should include:
 - Name of Reference Company
 - City/State
 - Type of Business
 - Describe relationship to respondent
 - Contact name/title
 - Contact phone and e-mail
 - Short description of programs/services provided
- Financial Qualification & Full Disclosure (1 page)
 - Provide form of business classification (i.e., sole proprietorship, partnership, or corporation) and Dun's number, if assigned.
 - Quick ratio (current assets - current liabilities),
 - Corporate Website address (including annual report if available)
 - Identify pending litigation and the final resolution or present status of such matters.
 - Conflict of Interest - All respondents shall disclose in their proposal any and all relationships between themselves, the program and/or members of their program team and PSE, its employees, or its customers.

EXHIBIT C: PROPOSAL REQUIREMENTS FOR CATEGORY B

Table 1. *Company Profile*

Company Name:	
Headquarters (City / State):	
Branches (City / State):	
Does your firm have a local presence to the Puget Sound area (Western Washington) or in the Northwest? If no, provide closest location.	
Number of continuous years in business?	
Total Number of Employees (note Full Time, Part Time or Other)	
Is your firm Certified as a diverse organization (i.e. Women, Minority, or Veteran owned)? If yes, identify category.	
Dun and Bradstreet Number	
Yearly Revenue/Sales Figures (2018, 2019, 2020 estimated, and 2021 projected)	
Do you have experience working with regulated entities (e.g. phone companies, gas or electric utilities, etc.) and their customers?	
Has your company declared bankruptcy in the past 36 months? If yes, explain.	

Section III – General Requirements

For all service components being offered, provide a description of how the Respondent meets or plans to meet the requirements presented in Section 3 under “Component Descriptions and Requirements” and “Key Considerations for Respondents” of this DER RFP.

EXHIBIT C: PROPOSAL REQUIREMENTS FOR CATEGORY B**Section IV – Component Specific Requirements**

Complete the section(s) for the vendor service component(s) the Respondent is proposing.

Program Design

- Provide a description of the proposed Program(s), including:
 - Type of DERs included (either singly or in combination) for the proposed program(s)
 - Targeted customer segments for the proposed program(s)
 - Incentive design for the proposed program(s)
 - Implementation plan for the proposed program(s)
- Describe the Respondent's experience in providing program design with a focus on innovative DER program design.
- Describe the need for the program, energy and/or capacity estimates, data which supports the need for the new approach, market readiness for an innovative idea, and any best practices or examples from other utilities implementing similar programs.

Customer Outreach and Enrollment

- Describe if and how local entities will be performing the customer recruitment and enrollment. Indicate to what extent the Respondent would rely on PSE to provide marketing support as required.
- Provide an Implementation Plan for providing Customer Outreach and Enrollment services referencing the requirements listed in Section 3 of this DER RFP
- Describe how the Respondent's marketing and outreach strategies consider how a DER program directly improves customer experience and satisfaction with PSE. If available, include proposed evaluation metrics and any required data needed to monitor success.

Equipment Procurement and Installation

- Indicate the customer segments for which the Respondent proposes to provide this service.
- Indicate the type(s) or combinations of DERs for which the Respondent proposes to provide this service.
- Describe if and how local entities will be performing the equipment installation.
- Provide a description of how the Respondent meets or plans to meet the requirements for equipment procurement and installation presented in Section 3 of this DER RFP.

Equipment O&M

- Describe if and how local entities will be providing the O&M services.
- Provide a description of how the Respondent meets or plans to meet the requirements for equipment O&M installation presented in Section 3 of this DER RFP.

EXHIBIT C: PROPOSAL REQUIREMENTS FOR CATEGORY B

Program Administration

- Indicate how the Respondent will provide the implementation services listed in section 3 of this DER RFP. Describe how the Respondent plans to implement that service, and what credentials and experience they have with that service. Describe experience conducting similar services for other utilities.

Section V – Indicative Pricing

Describe indicative pricing for the relevant vendor service component(s) proposed in the table presented Section 3 “Pricing for Vendor Service Components” in this DER RFP.

Section VI – Equity Plan

Please submit a CETA Equity Plan limited to 2 pages that details how the proposal addresses:

Each of the following CBI Categories:

- Improve the equitable distribution of energy and non-energy benefits to highly impacted communities and vulnerable populations
- Reduce burdens to highly impacted communities and vulnerable populations
- Produce long-term and/or short-term public health impact
- Produce long-term and/or short-term environmental impacts
- Help maintain or strengthen the energy security and resiliency of PSE's service area

Business Values:

- Has the developer adopted an Environmental, Social, Corporate Governance – ESG/sustainability policy, implementation process and business procedures? If yes, provide a summary description.
- What is the developer’s historic practices in regards to utilizing diverse businesses, including (but not limited to), women-, minority-, disabled-, and veteran-owned businesses and providing diversity training for its employees?
- Will the project have a community impact in regards to apprenticeships, workforce development and local employment?
- Does the developer intend to comply with the labor standards in RCW 82.08.962 and 82.12.962? If yes, provide a summary description.
- Is the bidding entity a women-, minority-, disabled-, and veteran-owned business (per WAC Chapter 480-107-145(2)(f))? If yes, specify relevant demographic.
- If the bidding entity is not a women-, minority-, disabled-, and veteran-owned business (per WAC Chapter 480-107-145(2)(f)), what is the entity’s commitment

EXHIBIT C: PROPOSAL REQUIREMENTS FOR CATEGORY B

(based on the % contract value) to subcontract with women-, minority-, disabled-, and veteran-owned businesses?

Survey Questions (will not count in your evaluation scoring):

- Is your organization certified as a diverse business enterprise through the Washington State Office of Minority and Women's Business Enterprises?
- If certified, what is the classification and when does it expire?

Section VII – Additional Exhibits and Deliverables

- All proposals must submit a completed Exhibit D: Mutual Confidentiality Agreement
- All proposals must submit a statement accepting Exhibit I: Master Services Agreement
- All proposals must submit a completed Exhibit N: IT Security Questions
- Proposals with a pending request for or agreement for PSE transmission or distribution must submit a completed Exhibit P: PSE Customer Consent Letter
- Corporate Safety Plan, and Drug and Alcohol Plan
- Continuity of Business Plan

Section VIII – Bid Certification and Contacts**Bid Certification**

The respondent hereby certifies that this proposal is genuine; not made in the interest of, or on behalf of, any undisclosed person, firm or corporation; and is submitted in conformity with any anti-competitive agreement or rules. The respondent has not directly or indirectly induced or solicited any other bidder to submit a false or sham proposal. The respondent has not solicited or induced any other person, firm or corporation to refrain from proposing. The respondent has not sought by collusion to obtain for itself any advantage over any other respondent. False certification will result in disqualification of bid and forfeiture of the bid fee.

- Proposal name
- Submitted by (full legal name of entity)
- Name of respondent entity (if different from above)
- Signature of an officer of respondent entity
- Name of signatory
- Title of signatory
- Date signed

EXHIBIT C: PROPOSAL REQUIREMENTS FOR CATEGORY B

Contacts

Primary Contact

- Contact name
- Contact title
- Name of company
- Mailing address
- City
- State/Province
- Zip code
- Primary phone
- Email

Alternate Contact (optional)

- Contact name
- Contact title
- Name of company
- Mailing address
- City
- State/Province
- Zip code
- Primary phone
- Email

Category B bidders will fill out this document (Exhibit C) for Phase 1. If selected for Phase 2, Category B bidders may be requested to provide additional information as needed.