



## **REQUEST FOR QUALIFICATIONS**

### **San Mateo County Energy Watch Commercial Program Contractor Pool**

Issue Date: Friday, November 15, 2019

RFQ Response Due Date: Friday, December 6, 2019, 5:00 PM

**Request For Qualifications  
San Mateo County Energy Watch  
Commercial Program Contractor Pool**

The City/County Association of Governments of San Mateo County (C/CAG), a Joint Powers Agency comprised of each of the 20 cities and the County in San Mateo County, invites your firm to submit qualifications to be listed as an available contractor or implementor of energy efficiency services for small businesses in San Mateo County.

A detailed Scope of Work is contained in Attachment A.

Qualifications must be received **no later than 5:00 PM on Friday, November 22, 2019**. Late qualifications will be rejected. The Request for Qualifications Response Form (Attachment B) must be sent to:

San Mateo County Office of Sustainability  
455 County Center, 4th Floor  
Redwood City, CA 94063  
Attention: Susan Wright  
Or E-mail: [swright@smcgov.org](mailto:swright@smcgov.org)

*Note regarding the Public Records Act:*

Government Code Sections 6250 *et seq.*, the California Public Records Act, defines a public record as any writing containing information relating to the conduct of the public business. The Public Records Act provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure.

Be advised all information submitted in response to this Request For Qualifications is a public record **without exception**. Submission of any materials in response to this Request For Qualifications constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by C/CAG if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

## Submittal Requirements

Please complete and return the RFQ Response Form (Attachment B), which describes the firm, organizational capacity, expertise, and other details related to the firm's ability to complete energy efficiency-related work for small business customers.

## Evaluation Criteria/Selection Process

Submissions will be evaluated for inclusion in the contractor pool based on the criteria below.

- Experience performing work of a closely similar nature;
- Experience working with small businesses;
- Experience working with similar programs;
- Strength, stability, experience, and technical competence of staff;
- Experience working with disadvantaged communities as defined by the California Public Utilities Commission (CPUC.);
- Quality of reference checks and/or customer reviews and
- Completeness of response.

C/CAG reserves the right to consider contractor performance based on comments received from submitted references. Experience and ability to perform high-quality, timely work is a significant consideration. C/CAG reserves the right to reject any or all submittals and waive any minor irregularities. Costs of developing the submittal or any other such expenses incurred by a company in responding to the RFQ are entirely the responsibility of the company, and shall not be reimbursed in any manner by C/CAG.

To withdraw a proposal, a company must submit a written request to C/CAG.

## Schedule for Review Process

| Date                | Description   |
|---------------------|---|
| November 15, 2019   | Issue RFQ   |
| December 6, 2019    | Response to RFQ Due   |
| December 9-12, 2019 | Consultant Selection Process. Consultant interviews may be held (if necessary). |
| December 13, 2019   | Selection List Released   |

Questions regarding the RFQ can be directed to Susan Wright at 650-363-4372 or [swright@smcgov.org](mailto:swright@smcgov.org)

### Attachments:

Attachment A: Scope of Work

Attachment B: RFQ Response Form

## **Attachment A: Scope of Work**

### **Background**

The San Mateo County Energy Watch (SMCEW) is a local government partnership between PG&E and the City/ County Association of Governments of San Mateo County (C/CAG) administered by the County of San Mateo's Office of Sustainability. SMCEW promotes and supports energy efficiency projects at San Mateo County local governments, schools, non-profits, and businesses. SMCEW provides coordination, outreach, and educational resources to help guide community members through the process of implementing energy efficiency projects.

Starting in 2019, the SMCEW Program shifted from being a PG&E "resource program," which is evaluated based on energy savings achieved, to a "non-resource program," which is evaluated based on its success in encouraging and promoting energy efficiency projects through a variety of channels and methods.

The shift to a non-resource program allows SMCEW to implement a Commercial Program which focuses on serving small businesses. Priority customers include those considered "hard to reach" as that term is defined by PG&E. "Hard to reach" customers are those that meet the following criteria: geographic location within a disadvantaged community as defined by [CalEnviroScreen 3.0](#) (See <https://www.cpuc.ca.gov/discom/> for information about Disadvantaged Communities) AND fewer than 10 employees, energy demand less than 20kW, rented or leased facility, OR primary language spoken is other than English.

With this RFQ, SMCEW intends to identify a pool of available contractors that regularly provide timely, high-quality, and professional energy efficiency services and implement projects. This RFQ seeks responses from any and all qualified companies and individuals interested in being listed as a qualified contractor for the SMCEW Commercial Program. This includes, but is not limited to; contractors, distributors, vendors, project managers, and trade professionals.

### **Scope of Work**

#### **San Mateo County Energy Watch Role:**

SMCEW intends to contact small businesses in San Mateo County to promote energy efficiency upgrades. When SMCEW identifies a customer interested in learning more about energy efficiency services and/or pursuing an energy efficiency project, the list of qualified contractors will be shared with the customer. If the customer chooses a contractor from the SMCEW contractor list, SMCEW will email the contractor with the customer's information (with the customer's permission).

#### **Qualified Contractor Role:**

Once the contractor receives an email referral from SMCEW, the contractor must contact the customer within two business days. The contractor must report the outcome of all SMCEW referrals to Susan Wright, C/CAG SMCEW Program administrator, including whether the project was completed and a brief description of the nature of the project.

### **Timing**

Contractors selected through this Request for Qualifications process will be added to SMCEW's Commercial Program list of qualified contractors through the end of FY 19-20. Selection does not

guarantee that the contractors will receive referrals.

Selected contractors will be expected to sign a release demonstrating their understanding that C/CAG guarantees no particular amount of work as a result of participation on the list, and that the contractor has no contractual relationship with C/CAG, nor will C/CAG provide any funds to the participating contractors.

C/CAG may remove contractors from the list at any time, subject to notice and an opportunity to provide additional mitigating information. Example reasons for removal include failure to contact customers in a reasonable timeframe or negative reviews from customer leads.

**Attachment B: Request For Qualifications (RFQ) Response Form**  
**(all questions require responses)**

Business Information:

1. Business name?
2. Business address?
3. Business phone number?
4. Name of designated contact, authorized to submit this RFQ response?
5. Designated contact phone number and email address?
6. Of your total annual businesses, what is the percentage occurring in San Mateo County?
7. What types of energy efficiency projects do you support?
  - a. Lighting
  - b. HVAC
  - c. HVAC Controls
  - d. Refrigeration
  - e. Insulation
  - f. Windows
  - g. Water heating
  - h. Other (specify)
8. How many years have you been in business?
9. What is the size of your team?
10. What is your past experience working with customers in disadvantaged communities (DAC)?  
(See <https://www.cpuc.ca.gov/discom/> for information about Disadvantaged Communities.)
11. What percentage of your current customers are small businesses with fewer than 10 full-time staff)?
12. Aside from English, are there any other languages spoken by your staff?
13. Are you currently a PG&E Trade Professional? If yes, for how long?
14. What is your experience working with public agencies on similar programs?
15. Would you use subcontractors for projects referred by SMCEW?
16. Why are you interested in being selected for SMCEW's qualified contractor pool?

Please provide references of two small business customers served by your company. Please provide names and contact information (phone, email) so we may contact them.