



SOUTHERN CALIFORNIA PUBLIC POWER AUTHORITY

Request for Proposals for Consulting Services on Electric Vehicles Joint Study

RFP Posting Date: July 31, 2012

Response Deadline: August 31, 2012 by 4:00 p.m. PDT

The Southern California Public Power Authority (SCPPA) is hereby soliciting competitive proposals for consulting services to establish a “blueprint” for electric utility business practices that will support a regional plug-in electric vehicle (PEV) charging system in Southern California that meets customer expectations and preferences, and facilitates cost-effective penetration of PEVs in Southern California. The study will recommend business practices that may be adopted by regional utilities including Southern California Edison, Los Angeles Department of Water and Power and other municipal utility members of the SCPPA.

Introduction

SCPPA, a joint powers authority and a public entity organized under the laws of the State of California, was created pursuant to the California Joint Exercise of Powers Act found in Chapter 5 of Division 7 of Title 1 of the Government Code of the state of California, and through the SCPPA Joint Powers Agreement for the purpose of planning, financing, developing, acquiring, constructing, operating and maintaining projects for the generation or transmission of electric energy.

In addition, SCPPA has the ability to enter into professional, technical, financial and other services agreements, at the request of and for the benefit of its members, to coordinate and facilitate collective project efforts among its members to render a more efficient process through which the member can acquire desired services. Any such potential services agreement entered into by SCPPA, pursuant to this RFP, may be directly utilized by any interested SCPPA member to serve its respective utility. The services pursuant to such an arrangement would be directly requested and approved by the individual member utility and the invoice for the services would be managed by SCPPA.

Membership of SCPPA consists of eleven cities and one irrigation district, which supply electric energy within Southern California, including the municipal utilities of the cities of Anaheim, Azusa, Banning, Burbank, Cerritos, Colton, Glendale, Los Angeles, Pasadena, Riverside, and Vernon, and the Imperial Irrigation District (Member Agencies).

SCPPA is governed by its Board of Directors, which consists of representatives from each of its members. The management of SCPPA is under the direction of an Executive Director who is appointed by the Board.

Scope of Work

This work is designed to complement and not duplicate parallel efforts and studies being done concurrently by other entities and agencies. In particular, the Southern California Association of Governments (SCAG) has commissioned a regional assessment of expected demand for EV chargers, barriers to EV adoption by consumers, need for public and work-place chargers and related information, trends and barriers that will be helpful to the regional planning of acceleration of EV introduction. This study will recognize and avoid duplication of that effort and recommend business practices by regional utilities. The results of the study are also designed to be self-sufficient and not necessarily contingent on the work of others.

- **An interview of each participating utility shall be conducted in order to capture the differences and similarities among the group in advance of performing the Tasks below:**
 - **Task 1:** Identify and validate, through review of existing literature, primary customer (end-user) research, focus groups, surveys or other methods, expectations of both prospective PEV purchasers and existing PEV drivers in Southern California with respect to charging infrastructure. Factors to consider include:
 - Differences between Plug-in Hybrid Electric Vehicles (PHEV) and Battery Electric Vehicles (BEV) drivers
 - Charging level and speed (i.e., level I, level II, DC fast charge)
 - Public charging availability for destinations and refueling for trips beyond the range of a vehicle's battery system
 - Expected roles of the local electric utility versus other electric vehicle service providers, including local retail businesses (e.g., parking structures) and employers
 - Presentation and delivery of charging options, rate options, and other promotions offered by local utilities
 - Expectations for continuity of service between home, workplace and public charging locations, and across utility service territories
 - Expectations for "roaming" services, (i.e., the ability to have PEV charging fees transferred to the driver's home utility bill)
 - Access to information
 - Charger availability, rates, and equipment at charging stations, including
 - Membership requirements for access to networked chargers
 - Needs of multi-family dwelling occupants
 - **Task 2:** Identify and validate the **barriers** to the realization of customer expectations and preferences identified in Task 1, including:
 - Differences in regulatory treatment of electric utilities (i.e., investor-owned versus municipal) and non-utilities in Southern California
 - Business models of PEV charging services and infrastructure providers

- Power supply for PEV charging
 - Existing methods for communication of charger availability
 - Charging pricing structures
 - Charging fee collection practices
 - Lack of common standards
 - Other barriers as may be identified
- **Task 3:** Identify and develop the **role of the utilities** and potential **programs, strategies and policies that utilities can implement** in the region to remove these barriers. These could include:
- Basic policies or principles that utilities should maintain when they design and deliver EV programs
 - Business strategies
 - Current and prospective utility programs and service offerings
 - Procurement standards
 - partnerships with electric vehicle charging infrastructure business entities or service providers
- **Task 4:** Develop the Task 3 validated programs, strategies, and policies that utilities can implement into a **Prioritized Action Plan Initiative in which regional utilities can follow** both individually and collectively. The deliverable Action Plan will have the following characteristics:
- Identify the goal or customer expectation the initiative is seeking to address and the desired outcome. Success and progress should be measurable by Key Performance Indicators (KPIs). Identify major milestones.
 - Identify the stakeholders and the specific steps that must be done (and by whom) to implement the initiative.
 - Identify an estimated duration and cost for the initiative based on previous experience or benchmark. Identify potential or recommended funding sources if possible. Note that some initiatives may take 5-10 years to fully reach maturity; however, the focus of this study is to near-term accomplishments.
 - Identify major factors or actions that are necessary for success that may be outside the control of the utilities (i.e. legislation).
 - Identify the recommended communication channels required to implement the initiatives.
 - Identify operational and customer service requirements.
- **Task Modification:** It may be determined that Tasks 1-4 may need to be modified to address an unanticipated omission or factor that needs to be included for consideration at SCPPA's sole discretion. Should that occur, a request by the contract administrator will be issued to the contractor. If the task is acceptable, the contractor will provide a written price and schedule modification (if any) to deliver the modified tasks.

- **Additional Task(s):** It may be determined that unanticipated additional task(s) may be required to adequately address the desired deliverable outside of the Tasks described. Should that occur, at SCPPA's sole discretion, a request by the contract administrator will be issued to the contractor. If the task is acceptable, the contractor will provide a price and schedule to deliver the additional task that was requested. At the sole decision of SCPPA, a notice to proceed would be issued by the contract administrator to the contractor. SCPPA may choose not to proceed with the additional task with no obligation by either party. Any additional Tasks will not modify the schedule for Tasks 1-4 except by mutual written agreement by both parties.
- **SCAG Transportation Study:** The contractor shall make such investigations as needed to understand the scope and deliverables of the SCAG study described above so as to not duplicate the work of that study through this project.

Project Deliverables

1. Each task will be assigned to the contractor(s) by the contract administrator in sequential order. The output from the previous task will provide the preliminary basis for the subsequent task.
2. Prior to the final report for each task, a draft report for review will be provided to the contract administrator so that the participating utilities can comment and provide feedback for the final task product. The draft will be in the form of 14 copies of the report as well as a Microsoft Word document version. The contractor administrator may request the contractor to provide a presentation, either in person at the SCPPA office building, or by webinar, to present the findings from the draft and solicit feedback. A mutually agreeable timeframe will be established for the comment period.
3. Based on the task feedback from the draft report, the final report will consist of 14 copies of a written report with applicable supporting documentation, graphs, charts, and appendices. A Microsoft Word document version will also be provided. A final task presentation; similar to the draft report presentation may be requested by the contract administrator at a mutually agreeable time.

Proposal Submission Required Elements

- **Transmittal Letter:** A brief statement of the Respondent's understanding of the work to be done and commitment to perform the work as scheduled including a summary of exceptions taken to the request for proposal requirements, statement of work, specifications, and reference to any proposed contractual terms and conditions required by the proposer. An officer authorized to bind must sign the proposal on behalf of the proposer and must include the following declarations on the Transmittal Letter:
 - "This proposal is genuine, and not sham or collusive, nor made in the interest or in behalf of any person not herein named; the proposer has not directly or indirectly induced or solicited any other proposer to put in a sham bid, or any other person, firm or corporation to refrain from submitting a proposal; and the proposer has not in any manner sought by collusion to secure for themselves an advantage over any other proposer."

- **Applicant Information:** Provide legal name of the Company, Physical Street Address, e-mail address, Telephone, Name and Title of individuals authorized to represent the Respondent.
- **Proposal:** Provide a description of the proposed project, how it meets each of the objectives of this request for proposals, a detailed description addressing all of the Scope of Work, as well as any tasks or task elements that are not part of the proposal.
- **Fees and Cost:** SCPPA is interested in discovering the Respondent's capabilities and pricing to make an informed decision and proceed to more specific negotiations. Pricing should be made based on good faith estimates of the requirements defined in this request for proposals. The proposal will provide a fixed price for each task to provide the needed research, information gathering, surveys, and other means to provide the deliverables described. Tasks may be awarded to different contractors based on the evaluation of the proposals.

In addition to the pricing for each task, an optional lower combined fixed price for all four tasks (combined award), may be offered at the contractor's discretion with a payment schedule. Whether a combined award is offered or not, all proposals shall have pricing for each task.

- **Experience:** Respondent will clearly identify project participants and management team.
 1. Describe your firm's experience as may be applicable to this request for proposals, your organizational structure, management qualifications, and other contract-related qualifications, including number of years firm has been in business.
 2. Specify key employees and describe their qualifications, experience and duties related to this request for proposals, including the office location(s) where work will be performed.
 3. Provide a commitment statement for the retention and use of key employees as proposed, their availability to initiate and sustain the proposal, as well as planned supplemental employees if key personnel are not available to assure project delivery.
 4. State whether proposer will use subcontractors to perform services pursuant to the contract. Should the use of subcontractors be offered, the proposer shall provide the same assurances of competence for the subcontractor, plus the demonstrated ability to manage and supervise the subcontracted work. Subcontractors shall not be allowed to further subcontract with others for work. The provisions of any contract resulting from this RFP shall apply to all subcontractors in the same manner as to the proposer.
 5. Respondent shall indicate any and all pending litigation that could affect the viability of respondent's proposal, continuance of existing contracts, operation or financial stability.
 6. Describe whether the proposer has, within the last three years, rendered any service to SCPPA or to any of SCPPA's Member Agencies, either as a contractor or subcontractor, either under the current proposer's name or any other name or organization. If so, please provide details (status as prime or subcontractor, brief description of the contract, contract start and end dates, the contract administrator name, and total actual contract expenditures).

7. **Schedule:** Respondents will clearly outline a milestone schedule for each task. The study objective is to have Tasks 1, 2, and 3 completed; and the Task 4 draft report submitted for review on or before December 31, 2012. The agreed upon schedule is not to be modified except by written mutual agreement by both parties.

Evaluation of Proposals

A selection committee, composed of participating utilities, will evaluate all submitted proposals on the following four criteria. Proposers that are within the competitive range of scores in the written proposal may be invited to an oral interview. Factors to be considered, but not limited to, include:

- Fees and Cost
- Schedule
- Experience
- Quality and Methodology (anticipated effectiveness)

Proposal Submission Delivery Requirements

There will be a proposer's teleconference associated with this request for proposals on August 13, 2012 at 11:00 a.m. PDT for a question and answer (Q&A) session and a Q&A document from this teleconference will be posted on the SCPPA's website. Clarification questions may also be addressed to Kelly Nguyen at knquyen@scppa.org.

One (1) hard copy of your response, including a transmittal letter of authentic offer with wet-ink authority signature, and any supporting documentation must be delivered prior to 4:00 p.m. PDT on August 31, 2012 to:

Southern California Public Power Authority
1160 Nicole Court
Glendora, CA 91740

One electronic copy of your proposal should also be delivered to the address above, preferably on a CD or USB flash drive, or alternately e-mailed to knquyen@scppa.org.

No contact should be made with the Board of Directors, any committee or working group, or SCPPA Participating Member Agencies concerning this request for proposals.

All information received by SCPPA in response to this request for proposals is subject to the California Public Records Act and all submissions may be subject to review in the event of an Audit.

Proposal Terms and Conditions

1. SCPPA reserves the right to cancel this RFP at any time, reject any and all proposals and to waive irregularities.
2. SCPPA shall determine at its sole discretion the value of any and/or all proposals including price and non-price attributes.

3. Proposals may be sub-divided or combined with other proposals, at SCPPA's sole discretion.
4. SCPPA shall perform an initial screening evaluation to identify and eliminate any proposals that are not responsive to the request for proposals, do not meet the minimum requirements set forth in the request for proposals, are clearly not economically competitive with other proposals, or are submitted by respondents that lack appropriate creditworthiness, sufficient financial resources, or qualifications to provide dependable and reliable services.
5. SCPPA reserves the right to submit follow up questions or inquiries to request clarification of information submitted and to request additional information from any one or more of the respondents.
6. SCPPA reserves the right, without qualification and in its sole discretion, to accept or reject any or all proposals for any reason without explanation to the respondent, or to make the award to that respondent, who, in the opinion of SCPPA, will provide the most value to SCPPA and its customers.
7. SCPPA may decline to enter into any potential engagement agreement or contract with any respondent, terminate negotiations with any respondent, or to abandon the request for proposal process in its entirety.
8. SCPPA reserves the right to make an award, irrespective of price or technical ability, if SCPPA determines that to do so would result in the greatest value to SCPPA and its Member Agencies.
9. Those respondents who submit proposals agree to do so without legal recourse against SCPPA, its Member Agencies, their directors, officers, employees and agents for rejection of their proposal(s) or for failure to execute or act on their proposal for any reason.
10. SCPPA shall not be liable to any respondent or party in law or equity for any reason whatsoever for any acts or omissions arising out of or in connection with this request for proposals.
11. SCPPA shall not be liable for any costs incurred by any respondents in preparing any information for submission in connection with this RFP process or any and all costs resulting from responding to this RFP. Any and all such costs whatsoever shall remain the sole responsibility of the respondent
12. SCPPA may require certain performance assurances from proposers prior to entering into negotiations for a proposed project. Such assurances may potentially include a requirement that proposers provide some form of performance security.
13. Either SCPPA collectively or Member Agencies individually may respond to, or enter into negotiations for a proposal. SCPPA is not responsible or liable for individual Member Agency interactions with the respondent which are not entirely conducted through SCPPA or at SCPPA's option or election to engage the respondent as defined within the Terms and Conditions herein.
14. Submission of a Proposal constitutes acknowledgement that the Proposer has read and agrees to be bound by the terms and specifications of this RFP and any addenda subsequently issued prior to the due date for a Proposal.
15. All information provided herein is accurate to the extent known by SCPPA, however no information in this RFP is guaranteed to be correct or is to be relied on by any respondent or

any third Proposers are expected to complete all of their diligence activities prior to entering into any final contract negotiations with SCPPA and shall not rely on any information provided herein.

16. SCPPA reserves the right to reject any Proposal for any reason without cause. SCPPA reserves the right to enter into relationships with more than one vendor, can choose not to proceed with any Proposer with respect to one or more categories of services, and can choose to suspend, issue a new superseding or replacement RFP at any time.

Additional Requirements for Proposal

1. **Consideration of Responses:** Submitted proposals should be prepared simply and economically, without the inclusion of unnecessary promotional materials. Proposals should be submitted on recycled paper that has a minimum of thirty percent (30%) post-consumer recycled content and duplex copied (double-sided pages) where possible.
2. **Insurance, Licensing, or other Certification:** If selected, the proposer will be required to maintain sufficient insurance, licenses, or other required certifications for the type of work being performed. SCPPA or its Member Agencies may require specific insurance coverage to be established and maintained during the course of work and as a condition of award or continuation of contract.
3. **Non-Discrimination/Equal Employment Practices/Affirmative Action Plan:** If selected, the proposer and each of its known subcontractors may be required to complete and file an acceptable Affirmative Action Plan. The Affirmative Action Plan may be set forth in the form required as a business practice by the Department of Water and Power of the City of Los Angeles which is SCPPA's largest Member Agency.
4. **Living Wage Ordinance:** If selected, the proposer may be required to comply with the applicable provisions of the City of Los Angeles Living Wage Ordinance and the City of Los Angeles Service Contract Workers Retention Ordinance. The Living Wage Ordinance provisions are found in Section 10.36 of the Los Angeles City Administrative Code; and the Service Contract Workers Retention Ordinance are found in Section 10.37 of the Los Angeles Administrative Code (SCWRO/LW0).
5. **Prevailing Wage Rates:** If selected, and if the project is funded in any part by resources with such an obligation, the respondent may be required to conform to prevailing wage rates applicable to the location(s) where any work is being performed.
6. **Child Support Policy:** If selected, proposer may be required to comply with City of Los Angeles Ordinance No. 172401, which requires all contractors and subcontractors performing work to comply with all reporting requirements and wage earning assignments and wage earning assignments relative to court ordered child support.
7. **Supplier Diversity:** Proposers shall take reasonable steps to ensure that all available business enterprises, including Women Business Enterprises (WBEs) and Minority Business Enterprises (MBEs) have an equal opportunity to compete for and participate in the work being requested by this request for proposals. Efforts to obtain participation of MBEs, WBEs, and other business enterprises could

reasonably be expected to produce a level of participation by interested subcontractors including 15 percent MBE and 7 percent WBE. SCPPA's Supplier Diversity program is modeled after that of the Los Angeles Department of Water and Power. Further information concerning the Supplier Diversity Program may be obtained from the Purchasing Division of the Los Angeles Department of Water and Power.

8. **SCPPA-Furnished Property:** SCPPA or participating utility drawings, specifications, and other media furnished for the Contractor's use shall not be furnished to others without written authorization from the source agency.
9. **Contractor-Furnished Property:** Upon completion of all work under this Agreement, ownership and title to reports, documents, drawings, specifications, estimates, and any other document produces as a result of the Agreement shall automatically be vested to SCPPA and no further Agreement will be necessary for the transfer of ownership to SCPPA. SCPPA has the sole right to distribute, reproduce, publish, license, or grant permission use all or portion of the deliverable documentation or presentations.
10. **Contractor Payments:** The contract to be awarded pursuant this RFP will be a firm fixed price contract, with payments made by SCPPA to the Contractor within 45 days after the completion and submittal of the final report for each assigned task.

No mark-ups on contractor or subcontractor work will be allowed.

11. **Travel Time:** There are no reimbursement provisions for transportation, mileage, meals, and lodging for the Contractor or its subcontractors.