



REQUEST FOR PROPOSAL

For

East Bay Community Energy Authority

Accounting of Green House Gas Emissions from Retail

Electric Service

RESPONSE DUE

by

5:00 p.m.

on

May 24, 2019

For complete information regarding this project, see RFP posted at <https://ebce.org/solicitations/> or contact the EBCE representative listed below.

Thank you for your interest!

Jim Dorrance, Power Resources Associate

(510) 827-2051

jdorrance@ebce.org

East Bay Community Energy Authority – Request for Proposal

DESCRIPTION OF THE ENTITY

Background Information

East Bay Community Energy Authority (EBCE) was created as a California Joint Powers Authority on December 1, 2016. EBCE was established to provide electric power and related benefits within Alameda County, including developing a wide range of renewable energy sources and energy efficiency programs.

EBCE's financial activity commenced on December 1, 2016, when it succeeded the County of Alameda Community Development Agency in performing specified activities related to a community choice aggregation program. The County of Alameda authorized funding to the Community Development Agency to provide for costs incurred prior to the formation of EBCE. The County also provided start-up funding to EBCE, which EBCE paid back in full on February 26, 2019.

EBCE began providing electric power to customers in June 2018. In addition to resources provided from the County of Alameda, EBCE obtained bank financing to provide funding for operating costs and other expenditures.

Electric power is delivered to EBCE's customers through a contractual arrangement with Pacific Gas & Electric Company (PG&E). PG&E is also responsible to read electric meters, to send invoices to customers and to collect payments on behalf of EBCE. EBCE contracts with another service provider for customer account data management and a customer service call center. EBCE currently is under contract to purchase electric power from major suppliers. EBCE currently has twenty employees.

EBCE is governed by a Board of Directors that is made up elected officials from each of the participating jurisdictions and on representative (non-voting) from the Community Advisory Committee (CAC). The Board of Directors meet once a month and all meetings are open to the public.

STATEMENT OF WORK

East Bay Community Energy is requesting proposals from qualified firms who will quantify and disclose the greenhouse gas (GHG) emissions from the power generated on behalf of customers enrolled in EBCE's Electricity Service Plans during calendar year (CY) 2018.

A year contract is anticipated upon the satisfactory negotiation of terms.

There is no expressed or implied obligation for EBCE to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

Prospective respondents who have questions regarding this RFP may present and have those questions addressed. Please note that all questions are to be submitted via email to Jim Dorrance, jdorrance@ebce.org, by **May 20, 2019** by **5:00 pm**. All questions received will be answered and provided to all firms having provided notification of interest to respond.

Proposals in Portable Document Format (PDF) must be received by Jim Dorrance by **May 24, 2019** by **5:00**. EBCE reserves the right to reject any or all proposals submitted and the right to make further inquiries of responding firms.

NATURE OF SERVICES REQUIRED

General

EBCE is soliciting the services of a qualified firm to account for the quantity of carbon dioxide equivalent (CO₂e) emissions relating to the power procured on behalf of EBCE customers. The power sources include a combination of specified and unspecified power, renewables, and Asset Controlling-Supplier resources (ACS).

Scope of Work to be Performed

The selected firm will be provided with retail sales, generation, and procurement data from CY 2018. The selected GHG accountant will calculate carbon emissions related to EBCE's supply portfolio and provide a report of its results and methodology. EBCE intends on using methodology based on that of The Climate Registry to evaluate its portfolio.

Reports to be Issued

Following the completion of the accounting of the CO₂e emissions the firm will provide EBCE with a report outlined from the Methodology showing the total emissions from the power procured for each EBCE Electricity Service Plan including a totaling of the emissions by fuel type. The firm will directly follow the Methodology and report on compliance with the Methodology protocol.

Working Paper Retention and Access to Working Papers

All working papers and reports must be retained, at the auditors' expense, for a minimum of seven (7) years, unless the firm is notified in writing by the EBCE of the need to extend the retention period. The auditor will be required to make working papers available, upon request, to the following parties or their designees:

East Bay Community Energy Authority

In addition, the firm(s) shall respond to the reasonable inquiries of successor auditors and allow successor auditors to review working papers relating to matters of continuing accounting significance.

TIME REQUIREMENTS

Proposal Calendar (times are in PPT)

The following is a list of key dates up to and including the date proposals are due to be submitted:

Request for proposal issued	May 13, 2019
Pre-proposal questions submission deadline	May 20, 2019 by 5:00pm
Due date for proposals	May 24, 2019 by 5:00pm
Proposal Evaluation/Interivews	Week of May 27-31, 2019

Notification and Contract Dates

Selected firm notified before	June 3, 2019
Professional Services Agreement finalized	June 7, 2019
Work Begins by	June 14, 2019
Work Completed no later than	July 30, 2019

ASSISTANCE TO BE PROVIDED TO THE AUDITOR AND REPORT PREPARATION

Accounting staff and appropriate management personnel will be available during the audit to assist the firm by providing required schedules, information, documentation and explanations.

Submission of Notification of Interest

Firms interested in submitting a proposal are encouraged to provide their notification of interest in writing to:

Jim Dorrance: jdorrance@ebce.org

Pre-proposal Questions

Prospective respondents who have questions regarding this RFP, in general or specific to any of the entities for which proposals are being sought, may present and have those questions addressed. Please note that all questions are to be submitted in writing to **Jim Dorrance**, jdorrance@ebce.org, by **May 20, 2019 at 5:00 pm**. All questions received will be answered and distributed to all firms having provided notification of interest to respond by **May 22, 2019**.

Submission of Proposals

The proposal should include the following elements and is to be received by EBCE by **May 24, 2019 at 5:00 pm** via email for a proposing firm to be considered:

- a) Title Page

Title page showing the request for proposal subject, the firm's name; the name, address and telephone number of the contact person; and the date of the proposal.

- b) Table of Contents

- c) Transmittal Letter

A signed letter of transmittal briefly stating the respondent's understanding of the work to be done, the commitment to perform the work within the time period, a statement why the firm believes itself to be best qualified to perform the engagement(s) and a statement that the proposal is a firm and irrevocable offer for a period of ninety (90) days from date of submission

- d) Technical Proposal

The technical proposal should follow the order set forth in the "Technical Proposal – General Requirements" section of this request for proposal.

e) A Total All-Inclusive Maximum Price

A total all-inclusive maximum price for services.

Technical Proposals

General Requirements

The purpose of the Technical Proposal is to demonstrate the qualifications, competence and capacity of the firms seeking to undertake the GHG accounting for EBCE in conformity with the requirements of this request for proposal and working knowledge of the required Methodology. As such, the substance of proposals will carry more weight than their form or manner of presentation. The Technical Proposal should demonstrate the qualifications of the firm and of the staff to be assigned to this engagement. It should also specify an accounting approach that will meet the request for proposal requirements.

The Technical Proposal should address all the points outlined in the request for proposals. The Proposal should be prepared simply and economically, providing a straightforward, concise description of the respondent's capabilities to satisfy the requirements of the request for proposals. While additional data may be presented, the following subjects, items Nos. 2 through 9, must be included. They represent the criteria against which the proposal will be evaluated.

Independence

The firm should provide an affirmative statement that it is independent of EBCE as defined by generally accepted auditing standards.

The firm should also list and describe the firm's professional relationships involving EBCE for the past five (5) years, together with a statement explaining why such relationships do not constitute a conflict of interest relative to performing the proposed audit.

In addition, the firm shall give the EBCE written notice of any professional relationships entered into during the period of this agreement.

Firm Qualifications and Experience

The respondent should state the size of the firm, the location of the office from which the work on this engagement is to be performed and the number and nature of the professional staff to be employed in this engagement.

The firm is required to submit a copy of the report on its most recent external quality control review, with a statement whether that quality control review included a review of specific government engagements.

Respondent must disclose any debarment or other disqualification as a vendor for any federal, state or local entities. Respondent must describe the nature of the debarment/disqualification, including where and how to find such detailed information.

Partner, Supervisory and Staff Qualifications and Experience

Identify the principal supervisory and management staff, including engagement partners, managers, supervisors and others, who would be assigned to the engagement. Provide as much information as possible regarding the number, qualifications, experience and training, including relevant continuing professional education, of the specific staff to be assigned to this engagement. Indicate how the quality of staff over the term of the agreement will be assured.

Engagement partners, managers, other supervisory staff and specialists may be changed if those personnel leave the firm, are promoted or are assigned to another office. These personnel may also be changed for other reasons with the express prior written permission of EBCE.

Consultants and firm specialists mentioned in response to this request for proposal can only be changed with the express prior written permission of EBCE.

Other personnel may be changed at the discretion of the respondent if replacements have substantially the same or better qualifications or experience.

Similar Engagements with Other Government Entities and Community Choice Aggregators

For the firm's office that will be assigned responsibility for the GHG accounting, list the most significant engagements (maximum 5) performed in the last five years that are like the engagement described in this request for proposal. These engagements should be ranked based on total staff hours. Indicate the scope of work, date, engagement partners, total hours, and the name and telephone number of the principal client contact.

Identification of Anticipated Potential Accounting Problems

The proposal should identify and describe any anticipated potential problems the firm's approach to resolving these problems and any special assistance that will be requested from the EBCE.

Contract Provisions

Attached is a sample template of the agreement the selected auditor will be required to sign. Respondents must include in their proposals a statement as to their willingness to sign an agreement with the existing contractual language. Proposals must include specifics as to any contractual language or insurance requirements the respondent wishes to change. Please note that if you submit a proposal that does not address exceptions to the agreement, you will be held to have accepted all terms and conditions contained therein.

Oral Presentations

During the evaluation process, the audit committee may, at its discretion, request any one or all firms to make oral presentations. Such presentations will provide firms with an opportunity to answer any questions the audit committee may have on a firm's proposal. Not all firms may be asked to make such oral presentations.

Right to Reject Proposals

EBCE reserves the right without prejudice to reject any or all proposals.

Reservation of Rights

The issuance of this RFP does not constitute an agreement that any contract will actually be entered into by EBCE, who expressly reserves the right at any time to (a) waive or correct any defect or informality in any response, proposal, or proposal procedure, (b) reject any or all proposals, (c) Reissue an RFP, (d) prior to the submission deadline for proposals, modify all or any portion of the selection

procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals, and (e) procure any materials, equipment or services specified in this RFP by any other means, or determine that no project will be pursued.

All proposals submitted in response to this request shall be deemed public records. If a respondent desires to claim portions of its proposal exempt from disclosure, it is incumbent upon the respondent to clearly identify those portions with the word "confidential" printed on the lower right-hand corner of the page. We will consider a respondent's request for exemption from disclosure; however, a decision will be made based upon applicable laws. Assertions by a respondent that the entire proposal or large portions are exempt from disclosure will not be honored. All responses to this RFP shall become the property of EBCE and will be retained or disposed of accordingly.

EBCE shall not be liable for any precontractual expenses incurred by any respondent. EBCE shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

All data and information furnished by EBCE or referred to in this RFP are furnished for the respondent's convenience. EBCE does not guarantee that such data and information are accurate and assumes no responsibility whatsoever as to its accuracy or interpretation. Respondent's shall satisfy themselves as to the accuracy or interpretation of all such information and data.

By submitting a proposal in response to this RFP, the respondent waives all rights to seek any legal remedies regarding any aspect of this RFP, EBCE's selection of an independent auditor or their rejection of any and all proposals.