



Request for Proposals

Peninsula Clean Energy (“PCE”), a California Joint Powers Authority, is seeking proposals to hire one or more firms to install solar+storage or standalone storage systems at customer homes within PCE service territory. The firm(s) selected (“Consultant”) will be responsible for fielding PCE’s pre-identified customer leads, designing and installing systems, applying for funds from the Self-Generation Incentive Program (SGIP), and handling post-install administration.

Responses are due Friday, September 6, 2024, at 5:00 PM Pacific Time.

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1 RFP OVERVIEW

Peninsula Clean Energy Authority (PCE) issues this Request for Proposals (RFP) to seek offers from qualified solar, battery storage and/or energy developers to install approximately 200 solar+storage or standalone storage systems at customer homes and apply for incentives with the Self Generation Incentive Program (SGIP).

This RFP:

- Provides general background on PCE
- Describes the service sought by PCE (scope of work)
- Provides an opportunity for Proposers to describe their qualifications and experience and explain how they can contribute to the services requested.

Background

The SGIP incentivizes a variety of distributed energy resources (DERs) located at a customer's site, including battery energy storage systems (ESS). AB 209 (2022) and AB 102 (2023) collectively allocated \$280 million of new funding to SGIP for income-qualified residential customers and expanded incentives to include solar+storage projects. SGIP provides significant incentives which are expected to fully cover solar and energy storage systems for eligible customers. However, accessing these incentives is challenging, especially for underserved communities. One primary barrier is that customers may not know which installer they can trust to install their solar or solar+storage system. This has led many customers not to apply for SGIP funding for their residential ESS projects. The result is higher costs for customers and inaccessibility for income-qualified customers.

PCE is developing an SGIP Assistance Program to facilitate access to SGIP incentives for eligible customers. The program will help residential income-qualified customers install standalone ESS or solar + storage systems and reduce the price of their system by taking advantage of SGIP funding.

The Consultant selected from this RFP will be responsible for the entire SGIP application and resource installation process after customer acquisition. PCE will identify, recruit and pre-qualify participants. The Consultant will be responsible for evaluating prospective homes, confirming customer eligibility for SGIP incentives, submitting the SGIP application, securing rebate funding, installing the systems, and working with PCE to ensure installed resources can provide grid services to PCE. New funding for the SGIP is expected to become available around November 2024. PCE targets to hire the Consultant by September 2024 at the latest to ensure enough time to pre-qualify eligible customers before new SGIP funding becomes available.

Minority-owned, women-owned and locally-headquartered businesses are encouraged to respond to this RFP.

Potential Follow-on Contract

Successful execution of this program may lead to a subsequent contract for installation services for other PCE customers. If so determined at the conclusion of the SGIP Assistance Program, the subsequent contract would be separately negotiated with a distinct scope of work with similar elements.

2 ABOUT PENINSULA CLEAN ENERGY

Peninsula Clean Energy is the not-for-profit, locally-led electricity provider for San Mateo County and Los Banos. Our mission is to reduce greenhouse gas emissions by expanding access to sustainable and affordable energy solutions. The agency serves over 300,000 customers by providing more than 3,500 gigawatt hours annually of electricity that is 100% carbon-free.

Since Peninsula Clean Energy launched in October 2016, customers have saved over \$100 million and over 1 million metric tons CO₂e from our electric service compared to a 2016 baseline, which is equivalent to over 140 million gallons of gasoline use. The agency has earned investment grade credit ratings from Standard & Poor. For more information on Peninsula Clean Energy, please go to www.peninsulacleanenergy.com.

3 RFP SCHEDULE

The following dates provide an anticipated schedule for the RFP. Proposed dates after the proposal deadline (September 6, 2024) may be adjusted per PCE's discretion.

Event	Date
RFP released	August 7, 2024
Deadline to submit questions	August 16, 2024
PCE responses to be posted on PCE website	August 21, 2024
Deadline for proposal submission	September 6, 2024
Proposal review complete	September 13, 2024
Interviews	September 16-20, 2024
Notice of Award	September 23, 2024
Contract execution	October 11, 2024
Project kickoff	October 15, 2024

- **Question & Answer:** Proposers may submit questions concerning the RFP via email only at programsolicitations@peninsulacleanenergy.com. The subject line must be clearly marked as "<Vendor Name> - SGIP Developer RFP – Questions". PCE will not guarantee providing answers to questions submitted after the question deadline but will make reasonable efforts to do so. PCE will post and share responses to all questions submitted by the deadline established in this RFP publicly.
- **Addenda:** In the event if becomes necessary to revise any part of this RFP, PCE will issue an updated RFP with visibly marked changes. Any amendment to this RFP is only valid if it is in writing and issued by PCE. No oral interpretations or answers will bind PCE. All addenda issued by PCE will become part of this RFP.
- **Offer Review:** Peninsula Clean Energy will evaluate all Proposals according to the criteria listed below.
- **Contract Redline:** Prior to interview, each participant will provide a redline of Peninsula Clean Energy's [Standard Contract Terms](#).
- **Interviews with Shortlisted Vendors:** PCE is planning on conducting interviews with Shortlisted vendors virtually or at PCE's offices in Redwood City.

4 PROPOSAL SUBMITTAL

Proposals must be received on or before the above deadline and submittal must be by email to programsolicitations@peninsulacleanenergy.com with the subject "<Vendor Name> - Proposal - SGIP Developer". Only electronic submittals will be accepted.

By participating in Peninsula Clean Energy's RFP process, a Proposer acknowledges that it has read, understands, and agrees to the terms and conditions set forth in these RFP instructions. Peninsula Clean Energy reserves the right to reject any offer that does not comply with the requirements identified herein. Furthermore, Peninsula Clean Energy may, in its sole discretion and without notice, modify, suspend, or terminate the RFP without liability to any organization or individual. The RFP does not constitute an offer to buy or create an obligation for Peninsula Clean Energy to enter into an agreement with any party, and Peninsula Clean Energy shall not be bound by the terms of any offer until Peninsula Clean Energy has entered into a fully executed agreement.

5 CONTENT OF RESPONSE

Interested vendors must submit the following documents (except those marked "Optional") to be considered for awarding of this proposal. The proposal shall be no longer than 10 pages, not considering attachments.

1. Cover Letter

Including the following elements (1 page):

- 1.1. Introduction to Consultant
- 1.2. Reference to this RFP;
- 1.3. Legal business name, address, telephone number, and business status (corporation, limited partnership, individual, etc.);
- 1.4. Name of vendor's representative with respect to this RFP along with telephone number and email address;
- 1.5. A signature of an authorized individual.

2. Approach

Please provide the following:

- 2.1. A description of how you would achieve the Scope of Work detailed below;
- 2.2. Commentary on how to achieve the program's goals and objectives;
- 2.3. Summary of challenges you expect, and resolutions to those challenges, including at least the following:
 - a. The likelihood of SGIP incentives fully covering project costs (assuming participation in the SGIP Residential Solar and Storage Equity Budget)
 - b. Customer finance solutions (with particular consideration of servicing low-income customers financial solutions);
- 2.4. Identification and description of key partners, including those used for rebate admin, installers capable of servicing PCE's service territory, and providers of asset management platform required to monitor system performance, battery storage dispatch, and demand response enrollment
 - a. If any of the tasks from this RFP will be taken on by an external partner to Consultant, please describe in detail what work will be managed by which party, including details regarding how Consultant will manage coordination of these partnerships;
 - b. Description of technical solutions; List of solar, battery storage, and inverter OEMs recommended for use in this program
 - c. Recommended battery storage management system to be used for monitoring system performance and controlling battery storage dispatch
 - d. Techniques or tools for rapid deployment of systems to avoid service upgrades and other costs/delays
 - e. Approach to providing backup power at the home, including additional system requirements to make the home islandable, incremental cost of such requirements, and techniques utilized to maximize the amount of backup power available to customers, while still providing capacity for other battery energy storage system (BESS) use cases
- 2.5. Description of SGIP application process;
 - a. PCE requires SGIP applications to be loaded into the SGIP portal before the portal goes live to accept applications under the new Residential Solar and Storage

Equity Budget. Consultant must explain the process to ensure successful submission of the SGIP application, including all the steps and timelines, for approximately 200 applications

2.6. Description of technical and cost assessment;

- a. Describe the process and requirements for Consultant to complete the technical and cost assessments for each customer's home
- b. Describe the timeline for completing this work in anticipation of the opening of the new SGIP Residential Solar and Storage Equity Budget (expected end of November 2024)

2.7. Description of proposed financial solution

- a. Describe your proposal for covering the gap funding between the project costs and any available incentives and credits (if any)
- b. Provide any alternative financing structures that you prefer (if any)
- c. Payment terms of the proposed financial solution

2.8. Proposed solution to demand response and grid services

- a. Consider both SGIP requirements for enrollment in a qualified DR program, as well as PCE's grid services goal as described below

3. Qualifications and Experience

Submit information on your company, including a general description and company history.

Consultant must demonstrate the following:

- 3.1. Be on the SGIP Approved Developer List;
- 3.2. Must be registered and possess an active account at www.selfgenca.com, and be in good standing with the Program Administrator;
- 3.3. Must be able to administratively handle more than 200 SGIP applications simultaneously;
- 3.4. Must be able to track and manage SGIP funding requests for over 12- months, and troubleshoot any issues that may come up during that time;
- 3.5. Must be able to install at least 200 solar or solar+storage systems within 12 months of receiving a Confirmed Reservation Letter from SGIP;
- 3.6. Provide Certificate of Insurance for Commercial General Liability, demonstrating coverage for aggregate for bodily injury, property damage and personal injury (as specified in the template contract);
- 3.7. Have a satisfactory rating with the Better Business Bureau;
- 3.8. Agree to submit an Upfront Incentive Agreement Form for each project;
- 3.9. Not be in the process of dissolving, be insolvent or filing for Bankruptcy;
- 3.10. Must be licensed, and in good standing, to do business in the State of California;
- 3.11. References from three clients available by phone and email

4. Budget

Please provide the following:

- 4.1. Price per successful SGIP rebate application
- 4.2. Average all-in system costs on a \$/W basis for a typical solar system and a \$/Wh basis for a typical storage system
 - a. The typical solar+storage system should be based on a home that has a standard residential load profile, with 8,000kWh of annual usage, a panel upgrade, and no other home improvements.
 - b. Average ancillary home upgrade costs required to support a typical standalone storage or solar+storage system for a low-income customer (upgrade costs will likely be higher than the average installation). Consider remediation incentives provided by SGIP.
- 4.3. Any other costs expected by the Consultant

5. Supplier Diversity Questionnaire (Optional)

Peninsula Clean Energy's Supplier Diversity Questionnaire can be downloaded at: <https://www.peninsulacleanenergy.com/wp-content/uploads/2023/06/Supplier-Diversity-Questionnaire-V4.docx>. Please note, your response (or lack thereof) will have no impact on your contract status or eligibility to work with Peninsula Clean Energy in accordance with state law.

6 REVIEW AND SELECTION PROCESS

Evaluation will be based on a combination of quantitative and qualitative criteria. The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

- Completeness of the proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services;
- Qualifications and experience of the entity, including capability and experience of key personnel, and experience with other public and/or private agencies to provide these services;
- Total cost of systems installed and total cost to the customer, if any;
- Total number of systems provider can support across all tasks;
- Exceptions to PCE's Standard Contract Terms;
- Quality of references;
- Existence of, and circumstances surrounding, any claims and violations against you or your organization;

- Any other factors PCE deems relevant.

7 AGREEMENT TERMS

Awardees will be required to enter into a contract using Peninsula Clean Energy's Standard Contract Terms. Modification of the contract terms may be proposed for consideration by the Proposer for consideration by Peninsula Clean Energy but are not guaranteed to be accepted. Rejection of the final terms from Peninsula Clean Energy is grounds for disqualification. Proposers are required to provide any redlines to the standard terms prior to interview. Peninsula Clean Energy's standard contract terms are available for review here: <https://www.peninsulacleanenergy.com/contract-1-standard-template-sept-2023>

8 SUPPLIER DIVERSITY

Consistent with its strategic goals, Peninsula Clean Energy has a strong commitment to foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, and commitment to the organization's mission and the communities it serves. As part of that goal, Peninsula Clean Energy strives to ensure its use of vendors and suppliers who share its commitment to sustainable business and inclusionary practices.

To help ensure an inclusive set of vendors and suppliers, Peninsula Clean Energy's policy requires it to:

1. Strive to use local businesses and provide fair compensation in the purchase of services and supplies;
2. Proactively seek services from local businesses and from businesses that have been Green Business certified and/or are taking steps to protect the environment; and
3. Engage in efforts to reach diverse communities to ensure an inclusive pool of potential suppliers.

General Order 156 (GO 156) is a California Public Utilities Commission ruling that asks utility entities to set a goal to procure at least 21.5% of their contracts with majority women-owned, minority-owned, disabled veteran-owned and LGBT-owned business enterprises (WMDVLGBTBEs) in all categories. Qualified businesses become GO 156 certified through the CPUC and are then added to the GO 156 Clearinghouse database.

The CPUC Clearinghouse can be found here: www.thesupplierclearinghouse.com. Peninsula Clean Energy's policies and commitment to diversity are consistent with the principles of GO 156, and, therefore, respondents to this RFP are asked to voluntarily disclose their GO 156 certification status as well as their efforts to work with diverse business enterprises, including

those owned or operated by women (WBE), minorities (MBE), disabled veterans (DVBE), and lesbian, gay, bisexual, or transgender people (LGBTBE).

As a public agency and consistent with state law, Peninsula Clean Energy will not use any such provided information in any part of its decision-making or selection process. Rather, Peninsula Clean Energy will use that information solely to help evaluate how well it is conforming to its own policies and goals. Pursuant to California Proposition 209, Peninsula Clean Energy does not give preferential treatment based on race, sex, color, ethnicity, or national origin.

9 PENINSULA CLEAN ENERGY LEGAL OBLIGATIONS

Peninsula Clean Energy is not obligated to respond to any offer submitted as part of the RFP. All parties acknowledge that Peninsula Clean Energy is a public agency subject to the requirements of the California Public Records Act, Cal. Gov. Code section 6250 et seq. Peninsula Clean Energy acknowledges that another party may submit information to Peninsula Clean Energy that the other party considers confidential, proprietary, or trade secret information pursuant the Uniform Trade Secrets Act (Cal. Civ. Code section 3426 et seq.), or otherwise protected from disclosure pursuant to an exemption to the California Public Records Act (Government Code sections 6254 and 6255) ("Confidential Information"). Any such other party acknowledges that Peninsula Clean Energy may submit to the other party Confidential Information. Upon request or demand of any third person or entity not a party to this RFP ("Requestor") for production, inspection and/or copying of information designated as Confidential Information by a party disclosing such information ("Disclosing Party"), the party receiving such information ("Receiving Party"), as soon as practical but within three (3) business days of receipt of the request, shall notify the Disclosing Party that such request has been made, by telephone call, letter sent via email and/or by US Mail to the address or email address listed on the cover page of the RFP. The Disclosing Party shall be solely responsible for taking whatever legal steps are necessary to protect information deemed by it to be Confidential Information and to prevent release of information to the Requestor by the Receiving Party. If the Disclosing Party takes no such action, after receiving the foregoing notice from the Receiving Party, the Receiving Party shall be permitted to comply with the Requestor's demand and is not required to defend against it.

10 GENERAL TERMS AND CONDITIONS

1. **Peninsula Clean Energy's Reserved Rights:** Peninsula Clean Energy may, at its sole discretion, withdraw this Request for Proposal at any time, and/or reject any or all materials submitted. Respondents are solely responsible for any costs or expenses incurred in connection with the preparation and submittal of the materials for this RFP.
2. **Public Records:** All documents submitted in response to this RFP will become the property of Peninsula Clean Energy upon submittal and will be subject to the provisions of the California Public Records Act and any other applicable disclosure laws.
3. **No Guarantee of Contract:** Peninsula Clean Energy makes no guarantee that a contractor and/ or firm added to the qualified vendor list will result in a contract.
4. **Response is Genuine:** By submitting a response pursuant to this RFP, Respondent certifies that this submission is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the submitting firm has not directly or indirectly induced or solicited any other submitting firm to put in a sham bid, or any other person, firm or corporation to refrain from submitting a submission, and the submitting firm has not in any manner sought by collusion to secure for themselves an advantage over any other submitting firm.

11 DETAILED PROJECT DESCRIPTION AND SCOPE

Overview

SGIP incentivizes a variety of distributed energy resources (DERs) located at a customer's site, including battery energy storage systems (ESS). AB 209 (2022) and AB 102 (2023) allocated \$280 million of new funding to SGIP for income-qualified residential customers under the new "SGIP Residential Solar and Storage Equity Budget" and expanded incentives to also include solar+storage projects. With the recent updates, SGIP provides significant incentives for income-qualified customers, which are expected to fully cover solar and energy storage systems.

PCE has identified major barriers to participation in the SGIP program. One primary barrier is the complexity in navigating the application process. This has led many installers to not apply for SGIP funding for their residential battery energy storage projects. The result is higher costs for customers and inaccessibility by many high-risk customers.

Another major barrier to participating in the SGIP program, which has carve-outs explicitly for low-income customers, is financing customers' systems. Low-income customers are traditionally harder to lend to due to credit profiles and repayment risk. PCE expects that SGIP and ITC funds will cover the cost of the standalone storage or solar+storage installations in most cases. In order to plan for scenarios where SGIP and ITC do not cover the installation cost, PCE is asking respondents to propose a financing solution. See the "Technical Assessment and Financial Solutions" section for more details.

The PCE SGIP Assistance Program ("Program"), will help:

- Maximize deployment of standalone storage and solar+storage systems in PCE territory delivering material net financial benefit for each customer
- Simplify SGIP for customers by offering them a **no-cost SGIP application process**
- Encourage more installations of standalone storage and solar+storage systems for low-income customers through **financing solutions** for project costs beyond those covered by SGIP incentives (if any)

PCE will bring prequalified customer leads to this program, initially generating leads based on PCE customers' participation in other PCE programs, such as our low-income single-family home electrification direct install program. PCE will formulate an outreach campaign to ensure a sufficient number of leads are provided in order to achieve the Program's goals and objectives.

Beyond SGIP customers, PCE aspires to expand this program approach and deploy VPP-forming solar+storage to our general customer base. Contingent upon positive performance on the Program, the Consultant(s) PCE selects out of this RFP may be afforded the opportunity to develop an expanded program with PCE.

Program Goals and Objectives

- Ensure an affordable and easily accessible option for eligible PCE customers to add standalone storage or solar+storage systems at their homes
- Provide customers with lower utility costs and increased energy resilience
- Install systems at over 200 low-income customers' homes

The following paragraphs provide more detail regarding PCE's expectations of Consultants and where options may be proposed on the approach, followed by a detailed Scope of Work (SOW) intended as the basis for the contract.

Consultant's Role

PCE's ideal Consultant will help with the end-to-end processes involved in qualifying low-income customers, supporting their SGIP rebate applications, designing and installing their systems, capturing all available incentives, and managing the dispatch of the battery storage device in a way that fulfills program requirements and optimizes value.

PCE recognizes that some of the roles stated above might be best performed by a combination of partners. Respondents shall specify which services they will take on in-house, and which they will subcontract.

SGIP Application Management

The core responsibility of the Consultant will be to qualify the pre-identified customer leads for the SGIP program. This entails both the collection and verification of required SGIP application documents, as well as a technical assessment of the home to ensure that there are no significant hurdles for the installation of solar and storage systems at the property. Both workstreams have to be completed by the Consultant for at least 200 homes in advance of the SGIP opening up the new "Residential Solar and Storage Equity Budget" (expected in November 2024). On the first day the SGIP portal opens for application submissions, the Consultant must submit the complete SGIP application package.

Upon submission of the SGIP reservation, the Consultant will follow up as needed with the SGIP Program Administrator, and/or their vendors, to ensure a successful SGIP reservation (i.e. confirmed Reservation Request Form). After installing the system and receiving permission to operate (PTO) for the resource, the Consultant is responsible for finalizing the SGIP incentive by successfully completing the Incentive Claim step (i.e. confirmed Incentive Claim Form).

Technical Assessment and Financial Solutions

PCE intends for SGIP incentives to cover 100% of project costs for participating customers and encourages Consultants to develop offers that both take advantage of all available incentives and discounts (e.g. SGIP and ITC), and to rely on bulk purchasing and other economies of scale to reduce project costs. However, in some cases, install costs may exceed the available SGIP incentives due to the circumstances at a customer's home. As the SGIP Assistance Program is focused on income-qualified customers, PCE is planning on offering customers the installation of storage and/or solar + storage resources at no cost, requiring a solution for potential "funding gaps" (i.e the costs between project costs and available incentives and credits).

The Consultant must provide a technical assessment - including a system sizing analysis and a cost forecast for the installation of the resource (solar + storage and/or standalone storage) - to PCE before any work can be completed at a customer's home. The system sizing analysis must be based on the previous 12-months load at the customer's home and will be verified by PCE staff. The cost forecast must clearly outline the portion of the cost that the SGIP incentive is expected to cover, as well as any other discounts, credits or incentives the customer is eligible for. PCE encourages Consultants to research any available incentives and incorporate them into the cost forecasts provided with the responses to this RFP. Any remaining costs above and beyond the SGIP incentive, the ITC, and other available incentives must be justified by the Consultant and are subject to approval by PCE.

To cover any potential "funding gap" between the available incentives and credits and the actual project costs at a customer site, PCE could provide "gap financing" under its [Zero Percent Loan Offering](#). PCE would finance an amount equal to the total installation cost, less the SGIP incentive, the ITC, and any other available incentives. The Consultant would float the SGIP, the ITC, and other incentive contributions for the customer. The Consultant in this way would be responsible for applying for all available credits and incentives and will use them to offset their installation costs. PCE would finance any funding gap on the customer's bill, up to a cap, via PCE's zero percent loan. The cap-setting methodology will be determined by PCE, in consultation with Consultant.

PCE is open to considering other financing options as proposed by the Consultant in their response to this RFP, including financial solutions where either the Consultant or PCE bring all of the capital required for every project, inclusive of the scope pertaining to home improvements.

Demand Response and Grid Services

It is PCE's intent to incorporate the resources installed under the SGIP Assistance Program under PCE's "Virtual Power Plant" (VPP) strategy. PCE is looking for Consultants to suggest in their RFP response their recommended approach for creating a VPP that supports PCE's grid services goals. First and foremost, systems are expected to reduce load during peak times on a consistent basis throughout the year, thereby providing a load-modifying pathway for reducing PCE's resource adequacy (RA) obligations. In addition, Consultants should propose how they would ensure that customers can also benefit from the resiliency benefits of the storage system, i.e. that the system can provide backup power to customers in times of a grid outage. PCE will

collaboratively develop the Grid Services strategy for the resources under the SGIP Assistance Program with the Consultant. It must also be noted that PCE is currently working on developing a VPP strategy and distributed energy resources management system (DERMS) platform that incorporates a variety of load control technologies under one integrated system. When this system is available, PCE strives for incorporating the SGIP resources under this overarching DERMS platform.

In addition to providing grid services to PCE, the Consultant must also enroll all systems into a “qualified demand response (DR)” program per the requirements of the SGIP.

Consultant Scope of Work

1 Program Design and Set Up

1.1 Kickoff and Check-in Meetings

Consultant will develop an agenda and lead a program kickoff meeting with PCE to review program goals and objectives, budget, timeline, implementation, and administrative processes at a mutually determined date promptly following contract execution.

After the kickoff meeting, the Consultant will set up check-in meetings on a recurring schedule as mutually determined for the duration of the performance period. For check-in meetings, Consultant will work with PCE to determine the agenda at minimum one day prior to the meeting. Meetings will focus on program progress updates, reviewing deliverables, and determining expected milestones for the next meeting.

1.2 Finalize Program Design and Strategy

Consultant will assist PCE in finalizing the program approach and schedule. Prior to program launch, Consultant will:

- a. Establish project team for both Consultant and PCE, delineating the responsibilities across different workstreams (e.g. marketing, project management, rebate admin, etc)
- b. Co-develop with PCE refinements to customer qualification and interactions;
- c. Develop a process to receive inquiries and/or applications;
- d. Provide a checklist of the required documents to qualify for SGIP funding;
- e. Co-develop with PCE protocols for successful rebate reservations, rebate payouts, and process for rejected applications;
- f. Determine process for enrolling systems into a Qualified DR Program;
- g. Determine criteria for disqualifying customers for program participation, including a cost cap methodology that is jointly developed with PCE;
- h. Identify system hardware, software and integration approach for both on-grid and off-grid (islanded) functionality;
- i. Finalize project timeline;

2 Administrative Reporting Tasks

2.1 Participate in Program Meetings;

Program meetings would occur on a weekly or bi-weekly basis during the enrollment and installment period. Meeting frequency would decrease afterwards;

2.2 Provide Program Process Reports;

- a. Consultant will provide monthly Program Progress Reports. Consultant will share the report findings at the recurring check-in meeting. Program Progress Reports will include at minimum: program performance towards goals and objectives, successes and challenges (e.g., technical problems, implementation barriers, or customer issues, if any), and next steps.

2.3 Provide Monthly Invoices;

- a. The Consultant will provide monthly Expense Reports, including all associated invoices, by a mutually determined day of the month, to receive payment for services provided for the previous month. The Expense Report Template will include at minimum the following: applications submitted, customers served, administration labor, installation expenses;
- b. The Expense Report must specify key tasks, and the associated number of hours worked for each task;

3 Develop Final Program Report

Consultant will develop an Final Program Report within 3 months after completion of all installations. The Final Report will include at minimum the following:

- a. Executive summary;
- b. List of outcomes for each Program Objective;
- c. Lessons learned and recommendations for future programs
- d. Spreadsheet of all submitted customers, statuses, amount reserved (if any), amount received (if any) and SGIP identification number;
 - i. List of installed system and current installation status (distinguish between standalone storage and solar+storage systems);
 - ii. Total enrollments into DR programs;

4 Project Execution

4.1 Support Outreach Activities

PCE will be primarily responsible for marketing and outreach to customers via a range of outreach channels. Additionally, PCE will engage with community-based organizations (CBOs) partners to provide pre-qualified customer leads for the program. Consultant will:

- a. Work closely with PCE staff to ensure customer materials are accurate and consistent with the program;

4.2 Perform Home Assessment, Confirm SGIP Eligibility, and Execute Participation Agreement

- a. Reach out to customer via the leads generated by PCE;
- b. Perform technical assessment of home to identify (and possibly mitigate) any hurdles for installation;
- c. Perform system sizing analysis based on customer's historical usage. Provide system sizing and other system details (technical specifications etc.) to PCE and customer;
- d. Perform assessment of system cost, incentive amount, and remaining financing needed. Provide install scope of work and cost detail for PCE;
- e. Provide scope of work and bill benefit analysis for customer Confirm customer eligibility for the SGIP Residential Solar and Storage Equity Budget, using checklist. Screen out customers that are not eligible;
- f. Obtain required SGIP documentation from customers;
- g. Execute Program Participation Agreement once customer has been pre-qualified;

4.3 Manage SGIP Rebate Submission

The consultant will manage all aspects of the SGIP application process. Consultant will:

- a. Develop a process to accept inquiries and/or applications;
- b. Create a checklist of the necessary documents needed to qualify for SGIP funding;
- c. Secure all the necessary documents and signatures to submit a successful SGIP application, per the SGIP Handbook. Follow frequent updates to the SGIP Handbook and ensure compliance with the latest version;
- d. Manage the SGIP application process, including, but not limited to:
 - i. Obtain required documents from Host Customer;
 - ii. Verify all submitted documents and determine the maximum amount of funding eligible from SGIP;
 - iii. Completing and submitting Reservation Request and Incentive Claim Form documents on the SGIP website;
 - iv. Responding to questions and request from the Program Administrator (PG&E);
- e. Submit complete application in accordance with the SGIP Handbook on behalf of the Host Customer to the SGIP Program Administrator (PG&E);

- f. Provide PCE with original copies of Reservation Request Forms, Confirmed Reservation Letters, Incentive Claim Forms, Final Rebate Confirmation, and other supporting documents; Provide customer service to installers via phone and email, answering questions;
- 4.4 Provide supporting documentation for completed projects;

5 Finance

- 5.1 Determine, with PCE, the approach to financing, if deemed necessary;
- 5.2 Offer financed rate to customers once their SGIP reservation is accepted;
- 5.3 Work with PCE to determine the project cost that exceeds the contributions from SGIP, ITC, and any other external incentive available;
- 5.4 Identify the amount of “gap financing” required for each project, if any;

6 Install Solar+Storage Systems

Upon receiving the Confirmed Reservation Letter, the consultant will complete the following tasks within 12 months of receiving the letter:

- 6.1 Submit interconnection application and obtain interconnection agreement from PG&E ;
- 6.2 Apply for building permits on behalf of the customer;
- 6.3 Oversee installation and manage subcontractors, if any, installing measures outlined in the Scope of Work
 - a. All equipment must be installed in accordance with all applicable federal, state, and local laws, building and fire codes, manufacturer’s specifications and permitting requirements;
 - b. Test and commission the system for both on-grid and off-grid (islanded) functionality;
 - c. Establish monitoring system and portal: provide PCE and customer access;
 - d. Obtain final inspection approval(s);
 - e. Submit final interconnection documents and paperwork to PG&E;
 - f. Receive permission to operate (PTO);
 - g. Consultant will notify PCE of any delays which may result in an installation start date later than 120 days from the customer’s signed Program Participation Agreement;

- 6.4 Provide roof repairs and other home improvements, within mutually agreed upon guidelines;
- 6.5 Periodically, as mutually determined with PCE, perform quality control procedures to evaluate subcontractors' performance and implement changes as mutually deemed appropriate;
 - a. Where an inspection has been provided by the local Authority Having Jurisdiction (AHJ,) provide inspection report, which will be used as quality control for that installation. Consultant shall perform site visits in 5-10% of homes that didn't have an inspection report and provide reports to PCE on quarterly basis;
 - b. Additionally, PCE may request site visits of up to 10 homes receiving services. Consultant shall participate in project site visits with the designated PCE staff member(s) at a mutually determined date;
- 6.6 Within ten (10) business days of installation, educate customer in successfully operating and maintaining the new measure(s) installed;
- 6.7 Provide customer with equipment technical manuals, equipment warranty documentation, installation warranty documentation both electronically and in a three-ring binder;
- 6.8 Respond to workmanship warranty calls as needed and assist customer in responding to product warranty issues. Address all workmanship and product replacement warranty issues to reasonable customer satisfaction;

7 Grid Services

- 7.1 Enroll system in the Qualified DR program per the SGIP requirements before submission of the Incentive Claim Form;
- 7.2 Develop strategy for providing grid services to PCE, including daily load shift (i.e. reliability), as well as outage support (i.e. resiliency) services;
- 7.3 Maintain PCE dispatch requirements
 - a. Review & refine dispatch schedules as directed by PCE up to quarterly for 5 years, potentially renewable;
 - b. Work with PCE to incorporate resources under PCE's overarching DERMS platform if and when requested to do so;

8 Data Exchange for Customer, Installation and System Output

All pertinent data related to the customer, their SGIP application, installation and system output must be provided to PCE. Consultant shall:

- 8.1 Set up an electronic customer relationship management (CRM) for the Program;
- 8.2 With PCE, jointly define all the data elements to be captured as well as the method and frequency of the data transfer. At a minimum, data elements shall include the following:
 - a. Customer contact information (name, address, phone, email);
 - b. Customer enrollment status in SGIP and status for receiving services, including whether projects were declined by customer or infeasible with rationale;
 - c. Installed equipment and measures (make, model, nameplate, wattage);
 - d. Scheduled program activities, including date and time of site assessments, installations, inspections, etc.;
 - e. Customer Scope of Work and resulting job orders;
 - f. Photos or diagrams of site conditions prior to installation;
 - g. Equipment and measures installation costs (quoted, actual);
 - h. Completed customer forms and records, including SGIP documents, Program Participation Agreement, building permits, and inspection reports;
 - i. Customer payments collected;
 - j. Third-party rebate and funding sources utilized (program name, incentive amount, measure);
 - k. Final scope of work of work and costs;
 - l. Ongoing system performance data
- 8.3 Ensure data systems meet industry-standard security, including encrypted data when transferred