



Consent Item 8

TO: East Bay Community Energy Board of Directors

FROM: Cici Saekow, Senior Power Resources Manager

SUBJECT: Contract Management and Deal Capture Software with Adapt2, Inc.

DATE: April 21, 2021

Recommendation

Adopt a Resolution authorizing the Chief Executive Officer (CEO) to negotiate and execute a Consulting Service Agreement between East Bay Community Energy (EBCE) and Adapt2 Solutions, Inc. (“Adapt2”), for contract management and deal capture software services for a 3-year subscription term. The total amount of the Agreement is not to exceed \$675,000 over the term and shall start at the earliest in April 2021.

Background and Discussion

EBCE staff assessed how our energy portfolio and long-term contracts are currently managed and determined that a software solution would be required to better manage our current and upcoming deals and contracts related to long- and short-term energy procurement. To find a software solution staff issued a Request for Proposals (RFP).

1. Assessment, Review and Selection Process

EBCE staff assessed the contract management and deal capture needs in early 2021. It was determined that staff would need a more robust, reliable, and long-term solution to manage and store the particulars of short and long-term energy transactions. To accomplish the work, a software platform would be required to manage the relevant material components of our energy contracts, manage the contractual obligations, assist in settling transactions, and import energy market data to aid in evaluating existing deals. The software would replace existing Microsoft Excel-based data entry spreadsheets and provide a robust deal capture and contract management platform that currently does not exist in house.

For the RFP, a scoring rubric was created to objectively score all respondents. Staff issued the RFP via EBCE's RFP email list and additionally posted it to EBCE's solicitation web page. The RFP was open from January 14th, 2021 and closed on February 12th, 2021 and staff received a total of six responses. The scoring rubric graded, and ranked responses based on experience, references, solution alignment, and cost. After review, three finalists were selected, Adapt2 Solutions, PCI, and Power Settlements.

Staff conducted further assessments of the software from the three finalists which included in-depth product demonstration and discussions with the supplied references. It was determined based on the scoring that the Adapt2 platform was the top selection with the following advantages:

- Overall, the Adapt2 platform is more user friendly and allows for easier uploading, downloading, and manipulating of data. After the hands-on workshop, staff unanimously agreed that this functionality was valued and Adapt2's interface was the best.
- The Adapt2 Green module was built specifically to manage the complexities of renewable energy portfolios, built end-to-end, and no additional modules are required. This feature specifically fulfills one of EBCE's software requirements.
- Adapt2 was observed to have better connectivity capabilities, allowing EBCE to access all raw data natively, ensuring that EBCE will be able to integrate the data into our existing databases, Application Programming Interfaces (API), spreadsheets, and business intelligence platforms.
- Adapt2 provides an infrastructure that uses big data analytics, machine learning artificial intelligence that will allow EBCE to continuously improve for smarter market operations over time.
- Adapt2 has over 160 market implementations in the past 10 years. 15 market implementations in CAISO.
- While the cost of Adapt2 was higher than the other finalists it was determined the added value for the software platform, was worth the additional costs as the technology and architecture are more current and scalable. Additionally, total platform costs are within the range of expectations.

2. Proposed Subscription Services

EBCE staff reviewed the quote from Adapt2 which includes the following features and module components for the quoted package:

- Software licensing - EBCE staff will retain eight (8) user licenses to cover staff in Power Resources, Finance, and the Data and Analytics teams.
- Software updates- Adapt2 provides routine updates to maintain and enhance the service during the term of the Agreement.
- Hosting and cloud services - The software is configured to use Azure data centers with data backups being stored in the Tahoe data lake.

- Software support & maintenance- 250 hours of customer support annually
- Initial implementation, training, and setup costs

Fiscal Impact

The Agreement shall be for a three (3) year subscription term. The total amount of the Agreement is not to exceed \$675,000 over the term and shall start at the earliest in April 2021. These costs have been accounted for in the Power Resources budget.

Attachments

- A. Resolution Authorizing the CEO to Negotiate and Execute a Consulting Services Agreement with Adapt2, Inc.

RESOLUTION NO. __

**A RESOLUTION OF THE BOARD OF DIRECTORS
OF THE EAST BAY COMMUNITY ENERGY AUTHORITY AUTHORIZING THE CHIEF
EXECUTIVE OFFICER TO NEGOTIATE AND EXECUTE A CONSULTING SERVICES
AGREEMENT WITH
ADAPT2 INC. TO PROVIDE SERVICES FOR THE USE OF A
CONTRACT MANAGEMENT AND DEAL CAPTURE SOFTWARE PLATFORM**

WHEREAS The East Bay Community Energy Authority (“EBCE”) was formed as a community choice aggregation agency (“CCA”) on December 1, 2016, Under the Joint Exercise of Power Act, California Government Code sections 6500 *et seq.*, among the County of Alameda, and the Cities of Albany, Berkeley, Dublin, Emeryville, Fremont, Hayward, Livermore, Piedmont, Oakland, San Leandro, and Union City to study, promote, develop, conduct, operate, and manage energy-related climate change programs in all of the member jurisdictions. The cities of Newark and Pleasanton, located in Alameda County, along with the City of Tracy, located in San Joaquin County, were added as members of EBCE and parties to the JPA in March of 2020.

WHEREAS there is a need for EBCE to subscribe to and operate a Contract Management and Deal Capture software platform to meet Power Resources, Finance, and Data and Analytics objectives;

WHEREAS EBCE staff has conducted a thorough assessment of EBCE’s requirements for a Contract Management and Deal Capture software platform and evaluated several commercially available off-the-shelf software solutions via the issuance of a formal all-source Request for Proposals;

WHEREAS the services offered by Adapt2, Inc. was determined to be the best fit to meet the current and future needs of EBCE.

NOW, THEREFORE, THE BOARD OF DIRECTORS OF THE EAST BAY COMMUNITY ENERGY AUTHORITY DOES HEREBY RESOLVE AS FOLLOWS:

Section 1. The CEO is hereby authorized to negotiate and execute an EBCE Consulting Services Agreement with Adapt2, Inc. for subscription and related services for a Contract Management and Deal Capture Software Platform. The Agreement shall be for a three (3) year subscription term. The total amount of the Agreement is not to exceed \$675,000 over the term and shall start at the earliest in April 2021.

ADOPTED AND APPROVED this 21st day of April 2021.

Dan Kalb, Chair

ATTEST:

Adrian Bankhead, Clerk of the Board