



REQUEST FOR PROPOSAL

For

**East Bay Community Energy Authority
CAISO Scheduling Coordinator & Related Services**

RESPONSE DUE

by

5:00 pm

on

September 13, 2021

For complete information regarding this project, see RFP posted at ebce.org or contact the EBCE representative listed below. Thank you for your interest!

**Marie Fontenot | Senior Director of Power Resources, EBCE
510-361-6247
PowerResources@ebce.org**

**EAST BAY COMMUNITY ENERGY
REQUEST FOR PROPOSAL
SPECIFICATIONS, TERMS & CONDITIONS
for
East Bay Community Energy Authority:**

CAISO Scheduling Coordinator & Related Services

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STATEMENT OF WORK

A. BACKGROUND

EBCE is a not-for-profit public agency that operates a Community Choice Energy program for Alameda County and fourteen incorporated cities in Alameda County and San Joaquin County, serving more than 630,000 residential and commercial customers throughout the county. EBCE initiated service in June 2018 and is one of 19 community choice aggregation (CCA) programs operating in California. CCAs are expediting the climate action goals of their communities and those of California. EBCE is committed to providing clean power at competitive rates while reinvesting in our local communities. For more information about East Bay Community Energy, visit <https://ebce.org/>

B. TERM OF AGREEMENT

The initial term of the Agreement(s) will be for one to three years. EBCE reserves the right to extend the agreement(s) for additional years. Please submit pricing for one, two, and three year contract terms; indicate pricing for contract extensions.

C. SCOPE OF WORK

East Bay Community Energy is seeking proposals from interested and qualified parties to provide CAISO Scheduling Coordinator and Related Services.

The following section details the scope of work and requirements EBCE seeks and is meant as an initial guide for the submitted proposal. The successful proposal submission must demonstrate that the provider has the appropriate professional and technical experience and can fulfill the stated scope of work.

1. CAISO Scheduling Coordination Services

Serve as Scheduling Coordinator (SC) including performing short-term load forecasting (i.e. week-ahead, day-ahead, and hour-ahead), scheduling demand into the CAISO day-ahead market, performing real-time resource optimization, validating CAISO statements for demand settlements, minimizing and managing real-time imbalance exposure, accepting inter-SC trades (ISTs), and managing congestion revenue rights (CRR) portfolio and bidding into CRR auctions.

EBCE has generation resources under contract and a limited number of currently operational resources; SC must possess the capability and experience to schedule current and future generation and energy storage resources and support operationalizing resources as they prepare to sync to grid and begin deliveries to EBCE.

SC must perform regulatory obligations as relevant to role as Scheduling Coordinator. This includes but is not limited to year-ahead and month-ahead Resource Adequacy (RA) compliance and supply plan filings.

2. Portfolio Management and Procurement Advisory

Support ongoing refinement and implementation of EBCE's portfolio management strategy including assisting drafting, implementing and complying with its Energy Management Risk Policy. Respondents are expected to support regular review and revision of (as needed or as appropriate) the risk management policy and produce, maintain, and publish reports tracking EBCE's compliance with portfolio exposure, market risk, and credit limits. Respondent will also assist EBCE management and staff to present results to the Board.

Respondents may be asked to support procurement of energy, capacity, renewable and GHG-free commodities including issuing RFPs for multi-year offtake agreements, reviewing and evaluating bids/offers, and negotiating bilateral agreements with third party vendors.

3. Emerging Technologies and Program Design

EBCE contracts with emerging technologies and develops programs to deliver new and unique value streams to our customers. Respondents are asked to describe their experience with distributed generation, behind the meter resources, demand response (DR) including load modification, and electric vehicles (EV). This is not a core competency we're looking for, but maybe an interesting area to know what their experience is. Respondent is also asked to describe its experience with all forms of energy storage (chemical battery, flow battery, pumped hydro, compressed air, and flywheel).

EBCE is also interested in respondent's ability to support joint procurement opportunities.

4. Policy, Regulatory, and Legal Advisory Services

EBCE has an active Policy team that is engaged in regulatory and legislative activity and is seeking a partner that can help compliment these efforts. Coordinate with EBCE management and staff to ensure compliance with regulatory requirements pertaining to CCAs. Alert EBCE to potential market design or regulatory changes that may materially impact EBCE's resource portfolio. Participate as EBCE requests in proceedings at the Federal Energy Regulatory Commission, the CPUC, and the CAISO that may materially affect CCA competitiveness. Provide input on comments and/or provide testimony as appropriate. Of particular concern would be proceedings involving market design changes.

5. Middle Office, Risk, and Credit

Conduct daily monitoring and reporting on EBCE's counterparty credit. Provide daily credit limit recommendations consistent with EBCE's credit standards and provide recommendations for transaction level credit support. Verify executed transactions match delegations of authority or that transaction has gone through appropriate transaction approval process and complies with risk management guidelines and credit standards.

Experience in assisting client in counterparty credit management. Ability to respond to margin calls and perform collateral postings on behalf of EBCE and assist in developing an updated counterparty credit policy. Please describe potential working capital management solutions to support CAISO settlement process.

Serve as member of Risk Oversight Committee including attending meetings on a quarterly basis.

6. Deal Capture/System of Record and Reporting

Enter transactions executed by EBCE for all product types into system of record. Respondent to provide EBCE with access to its transaction data in a file format that is mutually agreeable. Communicate with Staff to validate all new contracts in the system of record and perform periodic audits against EBCE's internal tool to confirm accuracy and completeness of record.

Provide EBCE with reports through a secure web-portal; indicate respondent's ability to connect to EBCE's BigQuery database utilizing an API. Reports to include but not limited to:

- Counterparty credit report
- Energy risk management policy compliance report
- Daily up to date case and forward position reports for all products including expected payment date and contract, based on information available
- Daily activity (with delegation matrix)
- System hedge limits and exposure summary report
- Copies of all contracts and confirms related to transactions
- Official record for all EBCE transactions
- Ad hoc material preparation as requested

D. STATEMENT OF REQUIREMENTS

The successful proposal submittal(s) must demonstrate that the Consultant has the appropriate professional and technical background as well as access to adequate resources to fulfill the stated scope of work. Please submit pricing for one, two, and three year contract terms; indicate pricing for contract extensions. Information required to demonstrate respondent's ability to perform each service listed in the Scope of Work follows.

1. CAISO Scheduling Coordination Services

Respondents offering SC services must be certified by the CAISO as a scheduling coordinator that will be contractually responsible for scheduling loads and resources throughout the contract term. Respondents must describe the methodologies and general strategy that will be used for load forecasting and CRR portfolio management as well as all information systems that will be utilized in providing SC services to EBCE and identification of those which EBCE personnel will have access. Proposals must describe the process and methods to be used for validating CAISO charges and credits that will be passed through the EBCE.

Respondents should also describe how it will integrate with EBCE energy storage optimization software to dispatch storage assets via real-time signals.

Identify staff who will be tasked with responsibility of submitting compliance filings including but not limited to RA supply plan filings. Describe Respondent's approach to collaborating with EBCE team on procurement and compliance.

2. Portfolio Management and Procurement Advisory

Please submit pricing assuming two levels of support:

Option 1: "minimum support". This service offering is limited to procurement advisory and portfolio management (i.e. position monitoring and guidance to EBCE's designated transactors).

Option 2: "extensive support". This service offering includes supporting procurement of energy, capacity, renewable and GHG-free commodities, including issuing RFOs, evaluating offers and recommending transactions or offtake agreements to enter into.

3. Emerging Technologies and Program Design

Detail experience scheduling battery storage resources and details on future development plans. Provide additional detail describing experience and capabilities related to program design and resource settlement of:

- Electric Vehicle integration including EV load forecasting and EV load arbitrage;
- Distributed generation and behind the meter resources program design and resource settlement;
- Demand response (DR) including load modification measurement and settlements.

4. Policy, Regulatory, and Legal Advisory Services

Describe or provide examples of providing comments and testimony to the CPUC and CAISO.

Provide examples of regulatory monitoring, updates and oversight provided to clients with focus on demonstrating impact of regulatory change on client's portfolio or operations.

5. Middle Office, Risk, and Credit

Review EBCE’s current risk management policy documents. Describe respondent’s approach to tracking including specifying any tools or applications used.

Provide examples of credit reporting performed for other clients. Explain how Respondent will verify executed transactions comply with delegations of authority.

Describe staffing structure and number of employees performing middle office function.

6. Deal Capture/System of Record and Reporting

Identify the energy trading and risk management platform used by Respondent’s organization. If a proprietary solution, provide detailed description of its functionality. Detail of technology resources including different platforms and analytical resources and capabilities of respondent’s organization.

Provide EBCE with example reports and describe the secure web-portal used for data transfers including SQMD and other data delivery and integration. Describe Respondent’s ability to implement an API to connect to Big Query.

D. QUALIFICATIONS

a. Minimum Qualifications

- Certified CAISO Scheduling Coordinator
- Bidders should meet CAISO financial requirements and obligations (i.e., collateral obligations)

E. CONSULTANT SERVICES

- EBCE intends to award one Consulting Services Agreement based upon the highest-ranked score for each technical area described in Evaluation Criteria.

F. PROPOSED CALENDAR OF EVENTS

	Action	Date
1.	Issuance of RFP	August 30, 2021
2.	Deadline for questions/clarifications	September 7, 2021
3.	Question Responses posted Online	September 9, 2021
4.	Deadline to submit proposals	September 13, 2021
5.	Proposal Evaluation	September 14 - 20, 2021
6.	Finalist selection/interviews	September 21 - 24, 2021

7.	Final Negotiations and/or Best and Final Offer	tbd
8.	Award of Contract by Board of Directors (only if required by Procurement Policy, i.e. contracts >\$100,000 for 1 yr)	tbd

G. PROCEDURES, TERMS, AND CONDITIONS

GENERAL

Incurring Cost

This RFP does not commit EBCE to award or pay any cost incurred in the submission of the proposal, or in making necessary studies or designs for the preparation thereof, nor procure or contract for services or supplies. Further, no reimbursable cost may be incurred in anticipation of a contract award.

Claims Against EBCE

Neither your organization nor any of your representatives will have any claims whatsoever against EBCE or any of its respective officials, agents, or employees arising out of or relating to this RFP or these RFP procedures, except as set forth in the terms of a definitive agreement between EBCE and your organization.

Guarantee of Proposal

Responses to this RFP, including proposal prices, will be considered firm and irrevocable for one hundred eighty (180) days after the due date for receipt of proposals.

Basis for Proposal

Only information supplied by EBCE in writing by the Contact in connection with this RFP should be used as the basis for the preparation of Consultant(s)'s proposal.

Form of Proposals

Proposals must be submitted electronically by e-mail to PowerResources@ebce.org.

Amended Proposals

Bidders may submit amended proposals before the Deadline to Submit Proposals. Such amended proposals must be complete replacements for previously submitted proposals and must be clearly identified in a written format. The Contact will not merge, collate, or assemble proposal materials.

Withdrawal of Proposal

Bidders may withdraw their proposals at any time prior to the Deadline to Submit Proposals. The Consultant(s) must submit a written withdrawal request signed by the Consultant(s)'s duly authorized representative addressed to and submitted to the Contact.

Late Responses

To be considered, proposals must be received electronically by email and (optional) in person or via courier/mail or to the place specified by September 13, 2021 at 5pm. No late responses will be considered.

California Public Records Act (CPRA)

All proposals become the property of EBCE, which is a public agency subject to the disclosure requirements of the California Public Records Act ("CPRA"). If Consultant(s) proprietary information is contained in documents submitted to EBCE, and Consultant(s) claims that such information falls within one or more CPRA exemptions, Consultant(s) must clearly mark such information "CONFIDENTIAL AND PROPRIETARY," and identify the specific lines containing the information. In the event of a request for such information, EBCE will make best efforts to provide notice to Consultant(s) prior to such disclosure. If Consultant(s) contends that any documents are exempt from the California Public Records Act (CPRA) and wishes to prevent disclosure, it is required to obtain a protective order, injunctive relief, or other appropriate remedy from a court of law in Alameda County, before EBCE's deadline for responding to the CPRA request. If Consultant(s) fails to obtain such remedy within EBCE's deadline for responding to the CPRA request, EBCE may disclose the requested information.

Consultant(s) further agrees that it shall defend, indemnify, and hold EBCE or its agents, harmless against any claim, action, or litigation (including, but not limited to, all judgments, costs, fees, and attorney's fees) that may result from EBCE's assertion of an exemption or privilege as a basis for withholding any information marked confidential by the Consultant(s).

DO NOT MARK YOUR ENTIRE BID CONFIDENTIAL. ONLY MARK THOSE PAGES THAT YOU BELIEVE CONTAIN PROPRIETARY INFORMATION.

Confidentiality

All data and information obtained from or on behalf of EBCE by the Consultant(s) and its agents in this RFP process, including reports, recommendations, specifications, and data, shall be treated by the Consultant(s) and its agents as confidential. The Consultant(s) and its agents shall not disclose or communicate this information to a third party or use it in advertising, publicity, propaganda, or in another job or jobs, unless written consent is obtained from EBCE.

Generally, each proposal and all documentation, including financial information, submitted by a Consultant(s) to EBCE is confidential until a contract is awarded, when such documents become public record under State and local law, unless exempted under CPRA.

Electronic Mail Address

Most of the communication regarding this procurement will be conducted by electronic mail (e-mail). Potential Bidders agree to provide the Contact with a valid e-mail address to receive this communication.

EBCE Rights

EBCE and its Contact reserve the right to do any of the following at any time:

- a. Reject any or all proposal(s), without indicating any reason for such rejection;
- b. Waive or correct any minor or inadvertent defect, irregularity, or technical error in a proposal or the RFP process, or as part of any subsequent contract negotiation;
- c. Request that Bidders supplement or modify all or certain aspects of their proposals or other documents or materials submitted;
- d. Terminate the RFP, and at its option, issue a new RFP;
- e. Procure any equipment or services specified in this RFP by other means;
- f. Modify the selection process, the specifications or requirements for materials or services, or the contents or format of the proposals;
- g. Extend a deadline specified in this RFP, including deadlines for accepting proposals;
- h. Negotiate with any or none of the Bidders;
- i. Modify in the final agreement any terms and/or conditions described in this RFP;
- j. Terminate failed negotiations with any Consultant(s) without liability, and negotiate with other Consultant(s);
- k. Disqualify any Consultant(s) on the basis of a real or apparent conflict of interest, or evidence of collusion that is disclosed by the proposal or other data available to EBCE;
- l. Eliminate, reject, or disqualify a proposal of any Consultant(s) who is not a responsible Consultant(s) or fails to submit a responsive offer as determined solely by EBCE or its representative; or
- m. Accept all or a portion of a Consultant(s)'s proposal.

Supplier Diversity

Pursuant to California Senate Bill 255, Community Choice Aggregators (CCAs) are required to report to the California Public Utilities Commission on their diverse suppliers, as defined by CPUC General Order 156. Consistent with the California Public Utilities Code and California Public Utilities Commission policy objectives, Bidders that execute a contract with EBCE will be required to complete a Supplier Diversity Questionnaire. EBCE will not consider race, sex, color, ethnicity, or national origin in procurement decisions; providing such information will not impact the selection process or good standing of executed contracts.

EBCE encourages all eligible parties to get certified with the CPUC as a women, minority, disabled veteran and/or LGBT owned business enterprise (WMDVLGBTBE).

For overview information on the CPUC Supplier Diversity Program, please visit the program homepage (<https://www.cpuc.ca.gov/supplierdiversity/>). For information on the certification process and requirements, please visit the Certifications page (<https://www.cpuc.ca.gov/Certifications/>).

EVALUATION CRITERIA

Evaluations will be based upon the information provided in the proposals and such other information requested by Contact or EBCE, or as deemed appropriate by EBCE. Proposals must provide clear, concise information and sufficient detail to enable reviewers/evaluators to evaluate the responsiveness and quality of the proposals to all RFP requirements. Evaluators will also review the proposals for format to ensure conformance with the RFP requirements. Proposals that fail to meet RFP requirements could be rejected. The Contact or EBCE may waive minor irregularities in proposals if doing so would be in the best interest of EBCE. Evaluators may recommend discontinuing evaluation of any proposal that is considered not in compliance with the RFP requirements.

The review/evaluation team will select the proposal that offers the greatest value to EBCE based on an analysis of the following criteria:

	Technical Evaluation Criteria	Points
1.	<p>Experience and Qualifications</p> <ul style="list-style-type: none"> • Bidder should provide qualifications and experience relevant to SC services, highlighting experience with solar, wind, and storage generating assets. • Bidder must address all functions described in the “Statement of Requirement” section, above. 	25
2.	<p>Pricing</p> <ul style="list-style-type: none"> • Bidder should describe the method of compensation. • Bidder must indicate if/which services can be included “a la carte” and the corresponding pricing; and which services are included in the base service offering. 	25
3.	<p>Methodology/Approach</p> <ul style="list-style-type: none"> • Bidder should propose an approach to meet all Scheduling Coordinator services. 	40

	<ul style="list-style-type: none"> ● Bidder should address how approach would be economically and operationally advantageous to EBCE. ● Bidder should describe methodologies used for load forecasting and CRR portfolio management. ● Bidder should address information systems used to provide SC services. ● Bidder should describe process and methods for validating CAISO charges and credits that will be passed through to EBCE. 	
4.	References	10
	TOTAL	100

In addition to these technical evaluation criteria, EBCE will also consider a set of Special Procurement Preferences, outlined in our Administrative Procurement Policy.

As reflected in the Evaluation Criteria, contract award will not be based solely on cost, but on a combination of factors as determined to be in the best interest of EBCE. EBCE will not be bound to award the contract(s) based solely on the lowest bid submitted.

EBCE’s form of a Consulting Services Agreement is attached as **Attachment B** and includes EBCE’s current insurance requirements. Please note that these requirements are subject to change by EBCE prior to execution of a contract with a selected Bidder and may require annual updating during the term of a Consulting Services Agreement. Bidders are expected to note any exceptions to the Consulting Services Agreement in the Bidder’s response and failure to do so may preclude consideration of any requested change at a later date.

After evaluating the proposals and discussing them further with the Finalists or the tentatively selected Consultant(s), EBCE reserves the right to further negotiate the proposed work and/or method and amount of compensation. EBCE further reserves the right to consider the changes make to the Consulting Services Agreement in its evaluation and selection.

INSTRUCTIONS TO BIDDERS

EBCE CONTACT

The evaluation phase of the competitive process will begin upon receipt of bids until a contract has been awarded. Bidders must not have any contact with EBCE personnel nor should they lobby evaluators or any member of the staff or Board of Directors during the evaluation process. Any communications outside of the procedures set forth in this RFP may result in disqualification of bidder.

All questions regarding these specifications, terms and conditions are to be submitted in writing, via e-mail, by 5:00 p.m. PST on August 30, 2021 to:

Attn: Marie Fontenot
East Bay Community Energy
E-Mail: PowerResources@ebce.org

The EBCE website will be the official notification posting place of all Requests for Interest, Proposals, Quotes and Addenda. Go to <http://www.ebce.org/solicitations> to view current opportunities.

SUBMITTAL OF PROPOSALS

All bids must be received at East Bay Community Energy by 5:00 p.m. on September 13, 2021. Bids will be received only at the addresses shown below any bid received after that time and date or at a place other than the stated address will not be considered and will be returned to the bidder unopened. **Electronic bids must be submitted in a non-alterable format such as a .pdf.**

1. Bidders **must** submit an electronic copy of their proposal via email to the following:
 - a. Marie Fontenot, Senior Director - EBCE: PowerResources@ebce.org
2. Bidders are responsible for all of their costs required for the preparation and submission of a bid.
3. Only one bid response will be accepted from any one person, partnership, corporation, or other entity; however, several alternatives may be included in one response. For purposes of this requirement, “partnership” means, and is limited to, a legal partnership formed under one or more of the provisions of the California or other state’s Corporations Code or an equivalent statute.
4. All other information regarding the bid responses will be held as confidential until the Review Committee has completed its evaluation, a recommended award has been made by the EBCE Board of Directors, and the contract has been fully negotiated.
5. California Government Code Section 4552: In submitting a bid to a public purchasing body, the bidder offers and agrees that if the bid is accepted, it will assign to the purchasing body all rights, title, and interest in and to all causes of action it may have under Section 4 of the Clayton Act (15 U.S.C. Sec. 15) or under the Cartwright Act (Chapter 2, commencing with Section 16700, of Part 2 of Division 7 of the Business and Professions Code), arising from purchases of goods, materials, or services by the bidder for sale to the purchasing body pursuant to the bid. Such assignment shall be made and become effective at the time the purchasing body tenders final payment to the bidder.
6. Bidder expressly acknowledges that it is aware that if a false claim is knowingly submitted (as the terms “claim” and “knowingly” are defined in the California False Claims Act, Cal. Gov. Code, §12650 et seq.), EBCE will be entitled to civil remedies set forth in the California False Claim Act. It may also be considered fraud and the Consultant(s) may be subject to criminal prosecution.

7. The undersigned Bidder certifies that it is, at the time of bidding, and throughout the period of the contract, licensed by the State of California to do the type of work required under the terms of the Contract Documents. Bidder further certifies that it is regularly engaged in the general class and type of work called for in the Bid Documents.
8. It is understood that EBCE reserves the right to reject this bid and that the bid shall remain open to acceptance and is irrevocable for a period of one-hundred and eighty (180) days, unless otherwise specified in the Bid Documents.

RESPONSE FORMAT

1. Bid responses are to be straightforward, clear, concise, and specific to the information requested.
2. **Objections for the form of Consulting Services Agreement:** Bidders must provide any and all specific objections to the Form Consulting Services Agreement in order for any changes to be considered. Stating an objection does not guarantee that EBCE will accept such changes.

REQUIRED DOCUMENTATION AND SUBMITTALS

All of the specific documentation listed below is required to be submitted in order for a bid to be deemed complete. Bidders shall submit all documentation, in the order listed below and clearly label each section with the appropriate title (i.e. Table of Contents, Letter of Transmittal, Key Personnel, etc.).

- 1. **Table of Contents:** Bid responses shall include a table of contents listing the individual sections of the proposal/quotation and their corresponding page numbers. Tabs should separate each of the individual sections.
- 2. **Letter of Transmittal:** Bid responses shall include a description of Bidder's capabilities and approach in providing its services to the EBCE and provide a brief synopsis of the highlights of the Proposal and overall benefits of the Proposal to the EBCE. This synopsis should not exceed three pages in length and should be easily understood.
- 3. **Key Personnel:** Bid responses shall identify the lead contact and include a complete list of all key personnel associated with the RFP. This list must include all key personnel, and a description of their qualifications, who will provide services/training to EBCE staff and all key personnel who will provide maintenance and support services. For each person on the list, the following information shall be included:
 - a) The person's relationship with Bidder, including job title and years of employment with Bidder;
 - b) The role that the person will play in connection with the RFP;
 - c) Address, telephone, fax numbers, and e-mail address;
 - d) Person's educational background; and
 - e) Person's relevant experience, certifications, and/or merits.
- 4. **Supplemental Questionnaire:** Bidder shall include responses and supporting documentation for Attachment A: Supplemental Questionnaire
- 5. **Costs:** To the extent costs are associated with different levels of service, Bidder shall clearly identify cost structure and indicate EBCE's ability to select "a la carte" service components
- 6. **Overview of the Organization**
 - a) Provide a brief description of your organization.
- 7. **References:**

Bidders are to provide a list of at least three current clients. References must be satisfactory as deemed solely by responsible EBCE staff. References should have similar scope, volume, and requirements to those outlined in these specifications, terms and conditions.

References must include: company name, contact person (name and email), address, telephone number, date of services, and description of services provided. Bidders must verify the contact information for all references provided is current and valid.

Bidders are encouraged to notify all references that responsible EBCE staff may be contacting them to obtain a reference.

EBCE staff may contact some or all of the references provided in order to determine Bidder's performance record on work similar to that described in this request. EBCE staff reserves the right to contact references other than those provided in the Response and to use the information gained from them in the evaluation process.

Attachment A
Required Response Information

- A. Please provide an organizational description and qualifications including:
 - a. Bidders general size, resources and organizational structure with respect to the proposal.
 - b. Audited financial statements for the past three (3) years
 - c. Listing of key staff and credentials
 - d. Listing of three (3) similar engagements with reference information.
 - e. Comprehensive list of generation/storage resources respondent schedules currently in/into CA and US. Include capacity size, technology type, location, and length of time scheduling the resource.
 - f. Responses that address all elements of the “Statement of Requirements” in Section D of this document.
 - g. Suggested: Fifteen (15) page maximum.

- B. Please provide the approach as response to this proposal including:
 - a. Presentation of well-conceived work plan for implementation
 - b. Show how the work plan will meet EBCE’s objectives and schedule.
 - c. Suggestion of innovations, additional or modifications to the scope of this proposal including any additional value the Bidder can create to the scope of the proposal.
 - d. Suggested: Four (4) page maximum.

- C. Please provide a schedule with key implementation milestones or benchmarks along with required levels of EBCE staff time.
 - a. Suggested: One (1) page maximum.

- D. Please provide cost estimates including:
 - a. Bidder fee structure. Identify any changes to pricing associated with future EBCE expansion.
 - b. Direct and reimbursable expenses, if any
 - c. Details of cost by service for which the Bidder is responding to
 - d. Include costs for implementation and operations and maintenance post-implementation
 - e. Flexibility or additional cost to locate some portion of personnel in EBCE service territory.
 - f. Cost for any innovative components added to the scope of the proposal
 - g. Suggested: Three (3) page maximum.

- E. Comprehensive list of all California LSEs currently served, LSEs in the United States that are currently served, and California LSEs historically served in the last 10 years.
 - a. Suggested: Three (3) page maximum.

- F. Identification of potential or perceived conflicts
 - a. Indicate if respondent's organization trades on a proprietary basis. If so what is the dollar and load size of this portfolio. How does respondent propose managing competing goals across their proprietary portfolio and other clients?
 - b. Suggested: Five (5) page maximum.

- G. The preceding page limits are recommendations. The proposal in its entirety may not exceed 40 pages.

Attachment B
EBCE Consulting Services Agreement