



REQUEST FOR PROPOSAL

For

Ava Community Energy Authority
Customer Programs Roadmap Engagement Consultant

RESPONSE DUE

by

5 PM

on

August 27, 2026

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

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AVA COMMUNITY ENERGY
REQUEST FOR PROPOSAL
SPECIFICATIONS, TERMS & CONDITIONS
for
Ava Community Energy Authority:
Customer Programs Roadmap Engagement Consultant

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STATEMENT OF WORK

Ava Community Energy ("Ava") is seeking proposals from qualified consultants to implement a stakeholder engagement process that will inform the development of Ava's Customer Programs Roadmap.

The Customer Programs Roadmap will guide the evolution of Ava's portfolio of customer programs over a five-year period. The roadmap will establish a strategic framework for identifying, prioritizing, and sequencing future customer programs that advance decarbonization while supporting Ava's broader organizational priorities. Rather than designing individual customer programs, the roadmap will identify the types of programs Ava should pursue, where the agency is best positioned to create value, and how a portfolio of programs can work together to achieve long-term objectives.

Ava will lead development of the roadmap internally through a structured planning process that includes evaluating existing programs, defining organizational priorities, identifying future program concepts, assessing potential program portfolios, and developing a strategic framework to guide future customer program investments. Stakeholder engagement is a critical component of this effort and will help ensure the roadmap reflects the priorities, perspectives, and needs of the communities Ava serves.

The selected consultant will serve as Ava's stakeholder engagement partner by facilitating engagement activities, developing meeting materials, conducting outreach, facilitating public workshops and targeted stakeholder discussions, documenting stakeholder feedback, and synthesizing engagement results into clear recommendations that can be incorporated into the roadmap development process. While Ava has identified the overall engagement approach, stakeholder groups, and anticipated sequencing of engagement activities, the consultant will be responsible for executing the engagement process, refining implementation details, and working collaboratively with Ava staff to ensure engagement activities occur at key decision points throughout the roadmap development.

The consultant should be prepared to implement engagement activities on an accelerated schedule while remaining flexible to accommodate adjustments to the overall roadmap development process. Because engagement activities are closely tied to internal planning milestones, the timing of workshops and stakeholder discussions may shift as roadmap materials are developed. The selected consultant should have sufficient staff capacity to mobilize quickly and deliver multiple engagement activities within relatively short timeframes, including a concentrated public engagement period anticipated to occur over approximately two months.

Ava is seeking a consultant or consultant team with demonstrated experience designing and facilitating complex stakeholder engagement processes involving public agencies, local governments, community-based organizations, industry partners, and customers.

Strong candidates will demonstrate experience leading public workshops, facilitating discussions among diverse stakeholder groups, developing accessible engagement materials, and synthesizing input into concise summaries that inform Roadmap deliverables. Familiarity with California energy policy, customer-facing decarbonization programs, Community Choice Aggregators, and public sector engagement best practices is highly desirable.

BACKGROUND

About Ava

Ava Community Energy (Ava) is a not-for-profit public agency that operates as a Community Choice Aggregator (CCA) for Alameda County and San Joaquin County with eighteen member jurisdictions. Since initiating service in June 2018, Ava has grown to serve more than 806,000 total customers, representing a diverse mix of urban and rural communities. Ava's customer base is about 90% residential and 10% commercial by account, but the load is split closer to 40% residential and 60% commercial. Our service territory includes a wide range of housing stock, infrastructure readiness, socio-economic status, and languages spoken. Approximately 21% of our customers are low income.

Ava began serving customers in June 2018 and is one of 25 CCAs operating in California. Our unique value proposition lies in leveraging our competitive electricity products (Bright Choice, Renewable 100) to invest in delivering local benefits that are in line with our mission of increasing access to clean energy. Today, Ava has saved our customers over \$184 million, and eight of our member cities have already committed to 100% renewable energy through the Renewable 100 plan.

Roadmap Context

Ava began service to customers in 2018. Over the years, it has executed on a number of programs in response to early planning documents and customer needs. At this time, Ava's customer programs have matured significantly. The agency has successfully launched programs supporting energy efficiency, building electrification, transportation electrification, energy resilience, and load flexibility while continuing to respond to evolving customer needs, changing market conditions, emerging technologies, and new state policies.

In 2020, Ava's Board of Directors adopted the goal of providing 100% carbon-free electricity by 2030. While Ava is on track to meet this target through its power procurement strategy, reducing community-wide greenhouse gas emissions will require continued investment in customer programs that accelerate electrification.

Several of Ava's existing customer programs are also expected to sunset or evolve over the coming years, creating an opportunity to evaluate Ava's overall customer program portfolio and establish a strategic direction for future investments.

To support this effort, Ava is developing a Customer Programs Roadmap that will guide customer program planning over the next five years. The roadmap will establish organizational objectives, define how customer programs support Ava's strategic priorities, identify market opportunities where Ava is uniquely positioned to provide value, and recommend a portfolio of future customer programs and local development activities.

Roadmap Development Process

Ava is developing the roadmap through an internal planning process consisting of strategic analysis, portfolio evaluation, and stakeholder engagement. Key activities include:

- Assessing Ava's existing customer program portfolio and identifying market gaps;
- Defining organizational objectives, priorities, and performance metrics;
- Evaluating Ava's unique capabilities and strategic role within California's evolving clean energy landscape;
- Identifying and assessing future customer program concepts;
- Developing and evaluating alternative customer program portfolio scenarios; and
- Preparing a long-term roadmap that establishes priorities for future customer program development.

Stakeholder engagement will occur throughout the roadmap development process to inform major decision points. Ava will engage a variety of stakeholders (including staff of member agencies and ad hoc groups of the Board of Directors and Community Advisory Committee) while the selected consultant will support targeted stakeholder meetings with groups identified by Ava (e.g. community-based organizations, labor organizations, industry representatives) as well as public workshops for customers and the general public. Together, these engagement activities will help identify community needs, evaluate strategic tradeoffs, and strengthen the final roadmap.

The selected consultant will support Ava by facilitating stakeholder engagement activities at key milestones during the roadmap development. Anticipated activities include facilitating public workshops, conducting targeted stakeholder meetings, preparing engagement materials, documenting stakeholder feedback, and synthesizing input into concise summaries that inform Ava's roadmap development.

1. TERM OF AGREEMENT

The full term of the Agreement is expected to be for October 15, 2026 to October 15, 2027. The work is anticipated to be complete in June 2027, which allows for some buffer in the agreement term.

2. SCOPE OF WORK (SOW)

The Consultant will support stakeholder engagement activities throughout the development of Ava's Customer Programs Roadmap. Ava will lead the overall roadmap development process, including stakeholder identification, roadmap analysis, program concept development, and portfolio evaluation. The Consultant will support the engagement activities identified by Ava by facilitating discussions and workshops, preparing engagement materials, coordinating meetings, and synthesizing stakeholder and community feedback into actionable findings that inform roadmap development.

Task 1. Project Management and Coordination

The Consultant shall provide project management services throughout the engagement period.

At a minimum, the Consultant shall:

- Participate in a project kickoff meeting.
- Develop and maintain a project schedule for engagement activities.
- Participate in regular coordination meetings with Ava staff.
- Coordinate upcoming engagement activities with Ava staff.
- Track action items and project status.
- Coordinate with Ava staff to ensure engagement activities align with roadmap milestones.

Deliverables

- Project schedule
- Meeting notes and action items

Task 2. Stakeholder Engagement

The Consultant shall plan, coordinate, facilitate, and document stakeholder engagement activities that support the development of Ava's Customer Programs Roadmap. Ava will identify the stakeholder groups to be engaged, establish the objectives for each engagement activity, and provide strategic direction regarding discussion topics and desired outcomes.

The Consultant shall be responsible for developing materials, coordinating logistics, facilitating discussions, and documenting input for synthesis into the summary memoranda described in Task 3.

Stakeholder engagement will occur at key milestones during roadmap development and is anticipated to consist of two primary components: targeted stakeholder meetings and public workshops.

2.1 Targeted Stakeholder Meetings

The Consultant shall facilitate targeted meetings with stakeholder groups identified by Ava staff, which may include community-based organizations, labor organizations, industry representatives, and other stakeholders.

These meetings are intended to gather stakeholder perspectives on customer and community needs, implementation barriers, market opportunities, and other considerations that will inform Ava's development of future customer program concepts.

2.2 Public Workshops

The Consultant shall facilitate public workshops at key milestones during roadmap development. Workshops will include a combination of virtual and in-person events throughout Ava's service territory.

Public workshops are anticipated to:

- Present potential program portfolios and facilitate discussion to gather feedback to inform the final roadmap.

For each engagement activity, the Consultant shall:

- Develop agendas, facilitation plans, presentations, discussion guides, and supporting materials
- Coordinate participant scheduling and meeting logistics for stakeholder meetings
- Coordinate scheduling and meeting logistics for public workshops
- Facilitate discussions using methods appropriate for the intended audience
- Document stakeholder input and comments received from stakeholder meetings
- Document public input and comments received from public workshops
- Prepare a summary memorandum following each stakeholder meeting and public workshop

Deliverables

- Engagement schedule
- Meeting agendas, facilitation plans, discussion guides, presentations, and supporting materials
- Facilitation of the stakeholder and public engagement activities included in the selected scope
- Documentation of stakeholder and public input collected during engagement activities

Engagement Options

Offerors shall provide pricing for both engagement options below.

Engagement Activity	Option 1	Option 2
Targeted Stakeholder Meetings	3	6
In-Person Public Workshops	2	5
Virtual Public Workshops	1	2

Pricing shall include all planning, meeting coordination, facilitation, documentation, and reporting associated with each engagement activity, including translation of meeting materials and language interpretation services, as appropriate. See Section 10 for more information on how to structure the cost proposal.

Task 3. Stakeholder Feedback Synthesis

The Consultant shall synthesize stakeholder feedback collected throughout the engagement process into concise summary memoranda that identify key themes, opportunities, concerns, and considerations relevant to development of Ava's Customer Programs Roadmap.

The memoranda should identify recurring themes, opportunities, concerns, and other findings across stakeholder groups that may inform Ava's development of future customer program concepts and recommended customer program portfolio.

Deliverables

- **Targeted Stakeholder Engagement Summary Memorandum** summarizing key findings from the targeted stakeholder meetings and identifying considerations for Ava's development of potential customer program concepts.
- **Public Workshop Summary Memorandum** summarizing feedback received during the public workshops and identifying considerations for Ava's recommended customer program portfolio and final roadmap

3. CONSULTANT SERVICES

Ava intends to award one Consulting Services Agreement (CSA) based upon the highest-ranked score for each technical area described in Section 7.

4. PROPOSED CALENDAR OF EVENTS

RFP TIMELINE

Action	Date
Issuance of RFP	July 24, 2026
Bidder's Webinar	July 29, 2026 at 10 AM https://us02web.zoom.us/j/86050597844?pwd=af9wzsDx2kxnbhnbDwotnnT06aNbPI.1 Meeting ID: 860 5059 7844 Passcode: 432628
Deadline for questions/clarifications	August 5, 2026
Question responses posted online	August 7, 2026
Deadline to submit proposals	August 27, 2026 by 5PM to aschmidt@avaenergy.org
Finalist selection/interviews	Week of September 14, 2026
Final Negotiations and/or best and final offer	September 18, 2026
Award of contract by Board of Directors	October 2026

TENTATIVE TIMELINE FOR ENGAGEMENT ACTIVITIES

Action	Date
Kickoff meeting Ava and Consultant	October 2026
Targeted stakeholder meetings	January - March 2027
Public workshops	May - June 2027

5. PROCEDURES, TERMS, AND CONDITIONS

GENERAL

Incurring Cost

This RFP does not commit Ava 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 Ava

Neither your organization nor any of your representatives will have any claims whatsoever against Ava 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 Ava 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 Ava 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 aschmidt@avaenergy.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 by August 27, 2026 by 5PM to aschmidt@avaenergy.org. No late responses will be considered.

California Public Records Act (CPRA)

All proposals become the property of Ava, 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 Ava, 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, Ava 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 Ava's deadline for responding to the CPRA request. If Consultant(s) fails to obtain such remedy within Ava's deadline for responding to the CPRA request, Ava may disclose the requested information.

Consultant(s) further agrees that it shall defend, indemnify, and hold Ava 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 Ava'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 Ava 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 Ava.

Generally, each proposal and all documentation, including financial information, submitted by a Consultant(s) to Ava 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.

Ava Rights

Ava 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 Ava;
- 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 A 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 Ava will be required to complete a Supplier Diversity Questionnaire. Ava 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.

Ava 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/>).

6. MINIMUM FIRM QUALIFICATIONS

1. **Stakeholder Engagement Experience**

Successfully completed at least **three (3)** stakeholder engagement projects within the last **five (5) years** that included planning and facilitating public workshops, focus groups, interviews, or other stakeholder engagement activities for government agencies, public utilities, Community Choice Aggregators, or nonprofit organizations in California.

2. **Relevant Subject Matter Experience**

Successfully completed at least **three (3)** projects within the last **five (5) years** related to energy, decarbonization, climate, sustainability, resilience, or other customer-facing utility or public sector initiatives in California.

3. **Public Meeting Facilitation**

Demonstrated experience facilitating meetings with diverse stakeholder groups, including community-based organizations, public agencies, industry representatives, and members of the public in California over the last five (5) years.

4. **Stakeholder Feedback Synthesis**

Demonstrated experience preparing written summaries or reports that synthesize stakeholder feedback into findings or recommendations that informed planning, policy, program development, or other agency decision-making in California over the last five (5) years.

7. EVALUATION CRITERIA

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 Ava may waive minor irregularities in proposals if doing so would be in the best interest of Ava. 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 Ava based on an analysis of the following criteria:

Category	Points	Criteria
Stakeholder Engagement Approach	10	Clearly defined approach to facilitating targeted stakeholder meetings that will generate meaningful input to inform development of potential customer program concepts.
	10	Clearly defined approach to facilitating public workshops that encourage productive participation and generate actionable feedback to inform Ava's recommended customer program portfolio and final roadmap
	10	Clearly defined approach to documenting and synthesizing stakeholder feedback into concise, actionable findings that support Ava's roadmap development
Project Management and Delivery	5	Demonstrates a strong approach to project management, coordination with Ava staff, and communication throughout the engagement process.
	5	Demonstrates the ability to successfully manage multiple engagement activities and deliver high-quality work products on schedule
Team Qualifications	5	Demonstrated experience facilitating stakeholder engagement for public agencies, utilities, Community Choice Aggregators, or similar organizations.
	5	Demonstrated experience supporting projects related to energy, decarbonization, climate,

		resilience, sustainability, or customer-facing utility programs.
	5	Qualifications and relevant experience of the proposed project manager and key personnel, including facilitation of diverse stakeholder groups, and topical expertise on energy, decarbonization, climate, resilience, sustainability, or customer-facing utility programs.
Cost	6	Transparent and detailed budget that includes labor categories, hours, and pricing assumptions
	6	Cost is reasonable for the proposed scope, level of effort, and deliverable
Consulting Services Agreement Approval	5	Approval of Consulting Services Agreement with limited or no redlines
Ava's Special Procurement Preferences	4	Bidder is headquartered in Ava Service Area
	2	Bidder is headquartered in a Disadvantaged Community
	2	Bidder will use Union Labor
	2	Bidder is a Disabled-Veteran Owned Business
Total	80	

In addition to these technical evaluation criteria, Ava will also consider a set of Special Procurement Preferences (listed above), 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 Ava. Ava will not be bound to award the contract(s) based solely on the lowest bid submitted.

Ava's form of a Consulting Services Agreement is attached as **Attachment A** and includes Ava's current insurance requirements. Please note that these requirements are subject to change by Ava 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), Ava reserves the right to further negotiate the proposed work and/or method and amount of compensation. Ava further reserves the right to consider the changes made to the Consulting Services Agreement in its evaluation and selection.

8. INSTRUCTIONS TO BIDDERS

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 Ava 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 Wednesday, August 5, 2026 to:

Attn: Allison Schmidt
Ava Community Energy
E-Mail: aschmidt@avaenergy.org

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

SUBMITTAL OF PROPOSALS

All bids must be received at Ava Community Energy by 5:00 p.m. on August 27, 2026. Bids will be received only at the address 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. Allison Schmidt - Ava: aschmidt@avaenergy.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 Ava 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.), Ava 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 Ava 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 to the form of Consulting Services Agreement:** Bidders must provide any and all specific objections to the Consulting Services Agreement in order for any changes to be considered. Stating an objection does not guarantee that Ava will accept such changes.

10. 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 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 and their corresponding page numbers.

2. Letter of Transmittal: Bid responses shall include a description of Bidder's capabilities and approach in providing its services to Ava and provide a brief synopsis of the highlights of the proposal and overall benefits of the proposal to Ava. (1 page)

3. Key Personnel: Bid responses shall identify the lead contact for the project and provide a complete list of key personnel associated with this engagement. Proposals must include:

- Team organizational chart showing the structure of the proposed team, reporting lines and how key personnel will interact with Ava staff
- Key Personnel Table listing each individual, their qualifications, project role, responsibilities, and their expected Full-Time Equivalent (FTE) commitment to the project.
- Brief resumes of key team members clearly demonstrating relevant work experiences.

4. Contract-Ready SOW: Bidder should review the SOW in Section 2 and incorporate any recommended updates or revisions. Please explain the rationale for any major revision. The intent of this requirement is to ensure the final SOW reflects both Ava's objectives and the Consultants professional expertise so we can move forward with the project schedule without delays.

5. Stakeholder Engagement Approach: Describe your proposed approach to executing the stakeholder engagement activities described in the SOW. At a minimum, discuss your facilitation approach for targeted stakeholder meetings and public workshops, your methodology for documenting and synthesizing stakeholder feedback, project coordination with Ava, and any recommendations to enhance the effectiveness of the engagement process. Additionally, describe your proposed approach to providing language access services, including translation of materials and interpretation during engagement activities. Identify any information or support you would need from Ava to successfully execute the work. (4 pages max)

6. Costs: The Bidder shall submit a detailed cost proposal that includes pricing for **both engagement options** identified in the SOW.

At a minimum, the cost proposal shall include:

1. A lump-sum cost for **Option 1**.
2. A lump-sum cost for **Option 2**.
3. A breakdown of costs by task.
4. A breakdown of labor hours and billing rates by labor category for each task.
5. A schedule of hourly billing rates for all proposed personnel.
6. A description of any assumptions used to develop the proposed costs.
7. Identification of all anticipated direct project expenses included in the lump-sum price (e.g., facility rental, stakeholder stipends, refreshments, and other meeting-related costs).
8. Pricing for language access services, including translation of meeting materials and interpretation services, with assumptions regarding languages and level of service clearly identified.
9. Unit pricing for additional stakeholder meetings and public workshops (in-person and virtual), if requested by Ava.

The cost proposal should clearly identify the incremental costs associated with Option 2 compared to Option 1.

7. Team Qualifications: Bidders must demonstrate their team meets the minimum qualifications in Section 6. These qualifications must include: project descriptions (title, client, year, scope, and outcomes), client contact information, and the role of the proposer for each relevant engagement.

8. Work Samples: Bidders should provide at least one work sample illustrating a previous approach to stakeholder engagement over the last three years that addressed energy, decarbonization, and/or funding allocation topics for entities in government, non-profit, and/or utilities sectors.

9. References: Three references are required for each firm on the Consultant/Consultant team. References should provide insight into experience working with the relevant firm in the last three years, and should include company name, contact person (name and email), address, telephone number, date of services, and description of services provided.

Ava 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. Ava 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.

10. Redlines to CSA: Bidders must either provide (a) confirmation that they agree to all terms and conditions in Ava's CSA, or (b) a redlined version of the CSA. To expedite contracting, any redlines must be limited to **critical items only** and include clear written justification. Ava refuses to review any redlines that fail to include clear justification.