



Staff Report Item 4

To:	Ava Community Energy Authority
From:	Annie Henderson, Chief Customer Officer
Subject:	Receive Staff Report on Customer Programs Strategy Engagement Consultant Selection
Date:	October 7, 2026

Summary/Recommendation

Staff presents the Executive Committee with its recommendation to enter into a consulting services agreement with the Institute for Local Government (ILG), with CivicWell as its subconsultant, to facilitate external stakeholder engagement for Ava's Customer Programs Strategy. The recommended scope includes six targeted stakeholder discussions, five in-person public workshops, two virtual public workshops, and synthesis of feedback to inform Ava's strategy.

Financial Impact

This contract not-to-exceed (NTE) is \$242,365 for November 2026 through December 2027.

Analysis and Context

Ava is developing a Customer Programs Strategy to guide customer program decisions over the next five years. Staff will lead the strategy and internal engagement with Board and Community Advisory Committee ad hoc groups, municipal staff, and Ava subject matter experts. Ava will also engage through its regular public meetings and customer surveys. The engagement consultant will lead the separately scoped targeted

discussions and public workshops, then document and synthesize input for staff to consider in developing the strategy.

Request for Proposals and Evaluation

Ava issued the engagement consultant Request for Proposal (RFP) in July 2026 and received nine conforming proposals by the August 27 deadline. The RFP sought an approach to targeted stakeholder meetings and public workshops, accessible participation, project coordination, and concise synthesis of feedback. Bidders were asked to price two scopes. Option 1 included three targeted meetings, two in-person workshops, and one virtual workshop; Option 2 included six targeted meetings, five in-person workshops, and two virtual workshops. Staff recommended Option 2 at the September Community Advisory Committee and Board meetings, and both bodies supported the broader engagement scope.

Staff evaluated the proposals against the RFP criteria, including stakeholder engagement approach, project management and delivery, team qualifications and relevant experience, cost, and applicable procurement preferences. Four bidders advanced to interviews during the week of September 14. Staff considered the written proposals, interviews, and subsequent scope and pricing discussions in selecting ILG and CivicWell.

Selection of Institute for Local Government and CivicWell

The Institute for Local Government (ILG) is a nonprofit organization based in Sacramento and located in a disadvantaged community. ILG would serve as the contract lead, with CivicWell, another nonprofit organization, as a subconsultant. Together, the team brings extensive experience designing and facilitating inclusive stakeholder engagement processes for public agencies, with a focus on incorporating community input into decision-making, building long-term relationships, and engaging communities most impacted by climate and policy decisions.

The ILG and CivicWell team demonstrated strong experience facilitating discussions across climate, energy, transportation, and other public-sector topics with diverse stakeholder groups. ILG has applied its engagement approach through work with local governments, regional agencies, and state partners, including the San Joaquin Council of Governments, California Strategic Growth Council, and California Air Resources Board. CivicWell complements this experience with decades of climate and energy expertise and established relationships with local governments, Community Choice Aggregators, Regional Energy Networks, utilities, state agencies, and community-serving organizations. Through the California Climate and Energy Collaborative and other regional convenings, CivicWell has experience bringing together diverse stakeholders to identify priorities, needs, challenges, and opportunities for action.

Staff also valued ILG's existing relationships in San Joaquin County, where Ava is continuing to build connections with community organizations and stakeholders. While several proposers demonstrated strong relationships in Alameda County, ILG brought particularly relevant experience and connections in San Joaquin County and identified opportunities to help Ava expand its relationships in the region.

The team also presented a clear and well-organized approach in both its proposal and interview and demonstrated the communication and facilitation skills needed for this assignment. The combined ILG and CivicWell team has sufficient capacity to support multiple engagement activities concurrently, allowing planning, outreach, facilitation preparation, technical coordination, and documentation to advance in parallel.

ILG's proposed cost of approximately \$242,000 was below the average proposal received for the same scope and was considered reasonable relative to the team's proposed approach, qualifications, and level of effort. Overall, the team's engagement and facilitation expertise, relevant climate and energy experience, local relationships, project capacity, and proposed cost support staff's recommendation to select ILG and CivicWell for this work.

Next Steps

Contract negotiations are underway. Staff anticipates a kickoff in November 2026 and consultant-supported engagement to take place in January through June 2027. Under the Administrative Procurement Policy, the Chief Executive Officer has authority to sign agreements under \$250,000. Given the level of board and public interest in this work and for comprehensive disclosure and transparency, staff will report out on the status of this contract as part of the October Board of Directors meeting consent agenda.

Attachments

- A. Executive Committee Slide Deck

Receive Staff Report on Customer Programs Strategy Engagement Consultant Selection

Executive Committee

10/7/26



Agenda, Background, & Timeline



Agenda

- Project Background & Timeline
- Overview of Broad Engagement Plan
- Overview of Responses to External Engagement Request For Proposals (RFP)
- Recommended Bid Selection
 - Qualifications
 - Additional Rationale
 - Summary of Cost & Hours
 - Team: Key Personal & Program Managers
- Conclusion & Next Steps

Focus for today's agenda item:

Receive a report on staff's recommended Customer Programs Strategy engagement consultant selection and intended path to contract execution

Staff is working on a Customer Programs Strategy that will guide programmatic decisions for the next 5 years.

As a critical part of this effort, staff seeks to contract with an engagement consultant who can facilitate stakeholder discussion groups and public workshops, and summarize stakeholder and public responses to inform the Customer Programs Strategy.

Following our Administrative Procurement Policy, staff issued a Request for Proposals in July 2026, received 9 conforming bids in August 2026, and selected a respondent to perform the desired work. This presentation provides information on the selected party with whom we plan to execute a Consulting Services Agreement.

Timeline

Issuance of RFP	July 24, 2026
Deadline to submit proposals	August 27, 2026
Finalist interviews	Week of September 14, 2026
Presentation of RFP responses to the Board	September 16, 2026
Bidder Selection	Week of September 21, 2026
Final negotiations	Underway
Presentation of selected bidder to Executive Committee	October 7, 2026
Contract Approval by Board of Directors	October 21, 2026
<i>TENTATIVE TIMELINE FOR ENGAGEMENT ACTIVITIES</i>	
Kickoff meeting Ava and Consultant	November 2026
Consultant-Supported Engagement begins	January 2027
Consultant-Supported Engagement ends	June 2027

Engagement Plan and RFP Response Overview



Overview of Engagement

- Ava staff will facilitate all internal engagement with ad hoc groups and subject matter experts and external engagement through presentations at regular public meetings and customer surveys.
- The consultant will facilitate external engagement through focused group discussions and public workshops.

Internal
Ad Hoc Group of Board
Ad Hoc Group of CAC
Ad Hoc Group of Local Municipal Staff
Ava Staff Subject Matter Experts

External
Targeted Stakeholder Meetings <i>(still TBD, below are likely groups)</i> • Local Community Based Organizations • Labor • Industry • Agriculture Customers • Large Commercial Customers • Small & Medium Commercial Customers
General Public • Survey Data • Public Workshops
Regular Public Meetings of Board and CAC

Summary of Scope and Responses

Engagement Activity	Option 1	Option 2
Targeted Stakeholder Meetings	3	6
In-Person Public Workshops	2	5
Virtual Public Workshops	1	2
<i>Total Engagements</i>	6	13

Across 9 bids	Option 1	Option 2
Minimum Bid Response	\$74,000	\$124,000
Maximum Bid Response	\$364,000	\$507,000
Average	\$172,000	\$267,000

At the September CAC and Board meetings, staff recommended proceeding with Option 2 for the scope of external engagement activities.

This recommendation was supported by both CAC and the Board.

Staff Bid Selection



Selected Bidder

After conducting interviews with four bidders, staff has selected the **Institute for Local Government**, and their sub-consultant CivicWell.

Qualifications

Stakeholder Engagement Expertise - ILG has more than a decade of experience designing and implementing inclusive, equity-centered engagement processes.

ILG's engagement work focuses on the following elements:

- Meaningful engagement that incorporates community input into decisions and outcomes
- Consistent application of authentic engagement practices across programs and initiatives
- Focus on building trust and long-term relationships with communities and stakeholders
- Prioritization of communities most impacted by environmental and policy decisions

Facilitation Expertise - CivicWell has extensive experience facilitating regional convenings with diverse stakeholder groups. Two examples include Regional Energy and Climate Hubs (REACH) and Catalyst Convenings.

- As the administrator of the California Climate and Energy Collaborative (CCEC), CivicWell convenes and coordinates community-serving organizations and government agencies in regions across the state through REACH. These convenings provide an avenue for ongoing engagement with state agencies, share knowledge and best practices, and help stakeholders identify and document the region's priorities, needs, and challenges.
- CivicWell also collaborates with the California Governor's Office of Land Use and Climate Innovation (LCI) and the California Strategic Growth Council (SGC) to convene a series of regional Catalyst Convenings across the state to help each region advance community-driven climate and land use priorities.

Relevant Subject Matter Expertise - ILG has applied their approach across a range of climate, sustainability, and other planning efforts, including work with cities of San Diego, Maywood, and La Puente; the Strategic Growth Council; San Joaquin Council of Governments; California Air Resources Board; and voter engagement work with Orange County. CivicWell complements that experience with more than four decades of climate and energy work and established engagement with California local governments, Community Choice Aggregators, Regional Energy Networks, utilities, state agencies, and other energy-sector partners.

Project Management and Synthesis - The team has sufficient capacity to accommodate multiple engagement activities concurrently and adjust quickly as Ava needs or timing evolves. The integrated ILG-CivicWell team structure also provides flexibility to advance meeting planning, technical content development, outreach, facilitation preparation, and documentation concurrently during periods of concentrated engagement.

Selected Bidder - Institute for Local Government

Additional Rationale for Selection

Staff expertise and capacity: The combined ILG and CivicWell team brings extensive experience in facilitation and engagement with our target audience in the topic areas that we wish to discuss. They have committed the necessary time to deliver a high quality work product for our customers that will strengthen the strategy that comes out of the engagement efforts.

Local Relationships: While many bidders had examples of strong relationships in Alameda County, fewer had strong alliances in San Joaquin County. Ava Community Energy has, over the course of the last 8+ years of service, developed relationships with local groups and community-based organizations in Alameda County, and we are actively building those relationships in San Joaquin County. ILG had numerous examples of San Joaquin-based relationships and repeatedly noted their desire to help us expand our connections in this region, which is a clear value-add to this effort.

Clarity of proposal and interview: ILG submitted a strong proposal, with clear examples of relevant work and descriptions of the approach to the scope presented in the RFP. Their interview presentation exhibited their strong communication skills, an essential to the work of engaging with our stakeholders.

Pricing: ILG's hourly rates, distribution of staff hours, total hours, and direct costs are reasonable and meet our expectations. Their total bid of approximately \$242,000 fell in the middle of the range of responses received and below the average bid.

Additional considerations: ILG is a non-profit located in a disadvantaged community in Sacramento. CivicWell is also a non-profit.

Highlights of Their Work

Project: Stockton Mobility Collective: Sustainable Transportation and Equity Project Implementation Grant

- Client: San Joaquin Council of Governments
- Years: 2021-2024

The Stockton Mobility Collective is a multi-partner initiative designed to expand equitable access to clean transportation through electric bikeshare and carshare, EV charging infrastructure, mobile ticketing, financial incentives, and workforce development. ILG designed and implemented community engagement informing program siting, design, and implementation. **The engagement created a direct feedback loop between residents, community partners, and program implementers, allowing the project team to identify barriers, test assumptions, and refine decisions related to program design, siting, incentives, and implementation.**

As part of a larger scope, ILG coordinated a peer learning network connecting public agencies, community-based organizations, and teams responsible for related climate and community investments across the region. ILG also facilitated the bi-monthly STEP Steering Committee, bringing together resident advisors, CBOs, public agencies, and project partners to gather community input, identify implementation barriers, problem-solve emerging issues, and refine program offerings.

Project: State/Local Energy and Climate Coordination

- Client: California Climate and Energy Collaborative (a consortium of the Regional Energy Networks)
- Years: 2023-2026

The State/Local Energy and Climate Coordination (SLECC) initiative **brings state and local leaders together to identify barriers, priorities, and practical opportunities for accelerating California's energy and climate goals.** As administrator of the California Climate and Energy Collaborative (CCEC), CivicWell convenes SLECC in partnership with state-agency Steering Partners, including the California Strategic Growth Council.

CivicWell designs and coordinates recurring virtual and in-person convenings and maintains a Priorities and Solutions Dashboard documenting issues including building decarbonization, energy efficiency, transportation electrification, community resilience, climate action planning, meaningful engagement and access to funding.

Through these activities, CivicWell helps surface local implementation challenges and connect state and local perspectives on how energy and climate programs, resources and assistance can be delivered more effectively.

Summary of Cost & Hours

Bid Response for Option 2		Option 1 (for reference)
Labor (970 total hours)	\$169,865	\$109,465
Direct Expenses - Travel - Meeting facilities, refreshments, & supplies - Translation & interpretation costs - Stakeholder Stipends / CBO mini-grants	\$72,500	\$32,500
TOTAL	\$242,365	\$141,965

Staffing (Quantity of Dedicated Staff)	Percentage of Hours
CEO / Strategic Advisor (2)	12%
ILG Director/Project Lead (1)	18%
ILG Program Manager (2)	46%
ILG Administrative Manager (1)	1%
CW Senior Program Manager (1)	9%
CW Program Associate (1)	14%

Hours Across Tasks	Percentage of Hours
Task 1: Project Management & Coordination	19%
Task 2: Stakeholder Engagement	63%
Task 3: Stakeholder Feedback Synthesis	18%

Key Personnel



Melissa Kuehne
Director of Enterprise
Programs & Special Projects



Project Lead

Melissa Kuehne brings more than 15 years of experience leading public-sector projects involving community engagement, facilitation, technical assistance, training and multi-partner coordination. As ILG's Director of Enterprise Programs and Special Projects, she manages complex statewide and regional initiatives and works with public agencies, community-based organizations, residents and other partners to design engagement processes, facilitate stakeholder dialogue, manage project delivery, and translate stakeholder input into practical findings and next steps. Her experience includes clean transportation and mobility, climate and sustainability initiatives, statewide technical assistance, and public engagement training for California local agencies.



Erica L. Manuel
CEO & Executive Director



Strategic Advisor

Erica L. Manuel is CEO and Executive Director of ILG and brings more than 20 years of experience in public engagement, customer education, strategic communications, and stakeholder strategy. Her background includes nearly a decade in senior leadership at the Sacramento Municipal Utility District (SMUD), where she led customer and community outreach on rates, clean energy programs, emerging technologies, and other customer-facing initiatives. Across her utility and public-sector work, Erica specializes in translating complex information for diverse audiences, understanding customer and community priorities, and connecting stakeholder input to program and policy decisions.



Bernadette Austin
CEO



Strategic Advisor

Bernadette Austin has served as Chief Executive Officer of CivicWell since 2023, supporting local leaders transforming vision into action in their communities. She leads a nonprofit organization with a 40-year track record of inspiring, equipping, connecting, and cultivating leaders working toward a more sustainable and resilient future. Previously, she served as Executive Director of a research center where she co-led research projects with the world's top research universities including a study on pandemic-era regional migration and transportation decarbonizing for the California Environmental Protection Agency. Bernadette also spent a decade working in public finance and community development.

Program Managers (46% of hours)



Hanna Stelmakhovych



Hanna Stelmakhovych brings 11 years of experience advancing inclusive community engagement with underserved communities, local agencies, and multi-sector partners, designing participatory processes grounded in community priorities. At ILG, she leads projects that convene stakeholder groups, design bilingual outreach and workshops, and deliver trainings that have equipped over 600 local government staff statewide with the skills and tools to implement authentic community engagement. A collaborative, trilingual practitioner, Hanna provides coaching, facilitation, partnership development, grant writing, and technical assistance to local governments and partners on climate, air quality, land use, transportation, and environmental justice topics.



Nikita Sinha



Nikita Sinha brings more than seven years of experience supporting California local agencies and communities on climate, clean mobility, sustainability, and resilience initiatives. As a Program Manager with ILG, she provides technical assistance, leads community engagement, and builds partnerships to help local agencies move climate and sustainability priorities toward implementation. Her experience includes clean mobility and transportation electrification initiatives, climate action and resilience planning, statewide sustainability programs, and capacity building for underserved jurisdictions.

Conclusion & Next Steps



Staff recommends negotiating and executing a consulting services agreement with the **Institute for Local Government** for approximately \$242,000 for a scope of work that materially aligns with what was outlined in the RFP and necessary to execute and report on 6 stakeholder discussions, 5 in-person public workshops, and 2 virtual workshops.

Under the Administrative Procurement Policy, the Chief Executive Officer has authority to sign agreements under \$250,000. Given the level of board and public interest in this work and for comprehensive disclosure and transparency, staff will report out on the status of this contract as part of the **October Board of Directors meeting consent agenda**.

