



CALIFORNIA ENERGY COMMISSION

Pre-Application Workshop

EPIC

Market Facilitation Program Area

Investing in California Communities through Building Energy Efficiency Workforce Development Grant Funding Opportunity (GFO-15-302)

Energy Deployment & Market Facilitation Office
Energy Research and Development Division
California Energy Commission
April 1, 2015



Housekeeping

- In case of emergency
- Facilities
- Sign-in sheet
- Updates on solicitation documents and today's presentation will be posted at:
<http://www.energy.ca.gov/contracts/epic.html#GFO-15-302>



Agenda

Time	Topic
1:30 pm	Welcome and Introductions <ul style="list-style-type: none">• Commitment to Diversity• EPIC Program Background, Policy Drivers, and Energy Goals• Project Introduction, Purpose, and Goals• Eligible Applicants• Key Dates• Available Funding and Allowable Purchases
1:45 pm	Groups and Project Narrative Minimum Requirements
2:00 pm	Application Requirements <ul style="list-style-type: none">• Formatting and Attachments• Response to Scoring Criteria• Evaluation Process• Grounds for Rejection
2:30 pm	Questions and Answers
4:30 pm	Adjourn



Commitment to Diversity

The Energy Commission is committed to encouraging participation in its Research and Development programs to reflect the rich and diverse characteristics of California and its people. To meet this commitment, Energy Commission staff conducts outreach efforts and activities to:

- Alert potential new applicants throughout the state to the Energy Commission's Research and Development programs and the funding opportunities they provide.
- Encourage greater participation by underrepresented groups including disabled veteran-, women-, minority-, and LGBT-owned businesses.
- Assist applicants in understanding how to apply for funding from the Energy Commission's research and development programs.



Background

- The Electric Program Investment Charge (EPIC) is funded by an electricity ratepayer surcharge established by the California Public Utilities Commission (CPUC) in 2011.
- The purpose of EPIC is to benefit the ratepayers of three electric investor-owned utilities.*
- EPIC funds clean energy technology projects that promote greater electricity reliability, lower costs, and increased safety.
- Funded projects must lead to technological advancement and breakthroughs to overcome the barriers that prevent the achievement of the state's statutory energy goals.
- Annual program funds total \$162 million per year with 80% administered by the California Energy Commission.

* Pacific Gas and Electric Co., San Diego Gas and Electric Co., and Southern California Edison



Policy Drivers to meet the State's Energy Goals

- Laws and Regulations
 - AB 32 (Global Warming Solutions Act)
 - AB 758 (Building Efficiency)
 - SB X1-2 (Renewable Portfolio Standard)
 - SB 535 (Greenhouse Gas Reduction Fund to Support Disadvantaged Communities)
 - SB 96 (Committee on Budget and Fiscal Review, Sections for EPIC)
 - AB 1109 (California Lighting Efficiency and Toxics Reduction Act)
 - Appliance Efficiency Regulations
 - California Energy Code
- Policies/Plans
 - Governor Brown's Clean Energy Jobs Plan (2011)
 - Comprehensive Energy Efficiency Program for Existing Buildings (2012)
 - CPUC Energy Efficiency Strategic Plan
 - Integrated Energy Policy Report



Project Introduction

- Numerous policies have identified the need for significant energy efficiency improvements to new and existing buildings to achieve the state's energy goals.
- As the housing and broader construction markets continue to improve, significant energy savings could be missed if new and existing buildings are not built, updated, or retrofitted with the best available technologies, techniques, and practices.
- Much of the skilled labor workforce may not be trained in the proper installation, operation, and maintenance of these energy efficiency advancements.



Project Purpose

Fund market facilitation projects that realize significant long-term energy efficiency gains in the building sector by ensuring an adequately trained workforce exists for the proper installation and maintenance of advanced energy efficiency technologies and strategies for:

- Constructing high performance attics and walls for new homes in a manner consistent with proposals for the 2016 building energy efficiency standards.
- Installing advanced energy efficiency measures in existing buildings located in disadvantaged communities (as defined by SB 535).



Project Goals

- Reduce the state's energy costs and greenhouse gas impacts by improving the installation and maintenance of energy efficiency equipment in buildings.
- Design, construct, and retrofit buildings to be consistent with energy efficiency best practices and technical specifications.
- Ensure the clean energy workforce receives the necessary skills to be able to install and maintain advanced energy efficiency equipment.



Eligible Applicants

- This is an open solicitation for public and private entities, except for publicly owned utilities.
- Applicants must accept the EPIC terms and conditions.
- Applicants are required to register with the California Secretary of State and be in good standing to enter into an agreement with the Energy Commission. <http://www.sos.ca.gov>
- Applicants must propose a team with proven ability to successfully complete similar projects.



Key Dates

Activity	Action Date
✓ Solicitation Release	March 18, 2015
Pre-Application Workshop	April 1, 2015
<u>DEADLINE FOR WRITTEN QUESTIONS</u>	<u>April 2, 2015 by 5:00 p.m.</u>
Anticipated Distribution of Questions and Answers	Week of April 20, 2015
<u>DEADLINE TO SUBMIT APPLICATIONS</u>	<u>May 5, 2015 by 3:00 p.m.</u>
Anticipated Notice of Proposed Award (NOPA)	June 3, 2015
Anticipated Energy Commission Business Meeting Date	July 8, 2015
Anticipated Agreement Start Date	August 10, 2015
Agreement Termination Date	March 29, 2019



Available Funding

- Up to \$9 million available in the following groups.
 - One award will be made per group.
- Funding amounts may be moved among the groups.

Groups	Amount Available
1: Advanced Energy Efficiency for new Homes Constructed Under the 2016 Building Standards	\$2 - \$4.5 million
2: Energy Efficiency Improvements in Existing Buildings located in Disadvantaged Communities (SB 535)	\$2 - \$4.5 million

NOTE: Deployment sites must be located in California and within an eligible electric investor-owned utility service territory.



Allowable Purchases

None of the EPIC funds may be used to provide workforce training for the following topics:

- Energy audits or Building Performance Institute Building Analyst certification to perform whole-home assessments;
- Training for HVAC installation, maintenance and duct installation, and insulation.
- Renewable generation hardware such as photovoltaic systems.
- Time of use costs for classroom(s).

However, such training may count for the match funding requirement, under the category of “advanced practice costs.”



Groups

- Each group will be evaluated and scored separately.
- Each Application must address only one project group.
- Applicants may submit more than one Application as long as each is for a distinct scope of work, with no duplication.



Group 1: Advanced Energy Efficiency for New Homes Constructed under the 2016 Building Standards

- Provide on-the-job training programs to construction superintendents on the proper installation of advanced energy efficiency measures and construction practices for new homes consistent with those proposed in the 2016 building standards.
 - May propose to train design teams including architects, building designers, foremen, building trade workers, subcontractors, and other related specialists.
- Training programs funded in this group should complement design assistance and training programs provided by other entities to architects and structural engineers designing high performance buildings.
- Training funded in this group will help ensure proper installation recognizing new characteristics of the following advanced energy efficiency measures:
 - High performance attics requiring technology-specific building practices different from standard attics.
 - High performance walls requiring specialized techniques depending on the materials, framing design, and thickness of insulation.



Group 1: Project Narrative Minimum Requirements

Project Narratives (Attachment 4) should provide a description for each of the following:

- How to leverage existing state-approved buildings or similar (widely accepted) accredited training programs to ensure trainees have adequate safety, electricity, and workmanship training and competency before going out to job sites.
- How to identify and address the skills needed to install the advanced energy efficiency measures described in the application.
- Housing construction sites for on-the-job training to upgrade the skills of the trainees to install the technologies and systems targeted by the proposed training; or how the applicant will acquire residential construction sites for on-the-job training and how these sites will be leveraged to upgrade the skills.
- How to disseminate building practices and techniques learned through this training to other construction superintendents (and other design teams, if applicable) working in new home construction in a language needed to communicate effectively with target audiences.



Group 1: Project Narrative Minimum Requirements

- A Measurement and Verification Plan that specifies a team of qualified independent performance testers with the expertise needed to conduct the following analysis as part of the application:
 - Assess whether the technologies used in on-the-job training opportunities are installed and operating according to required design specifications.
 - Measure the building energy use, determine actual energy savings resulting from the installations, and compare to the projected savings.
 - Make recommendations for installation improvements or additional training.
- How feedback from field performance of different technologies in different regions will be collected and reported to inform refinement and improvement of the California Title 24 Building Standards.
- A proposed plan to sustain the training beyond the term of the agreement.



Group 2: Energy Efficiency Improvements in Existing Buildings in Disadvantaged Communities

- Provide classroom and on-the-job training on the installation, maintenance, and operation of advanced energy efficiency technologies and measures in existing buildings located in disadvantaged communities.
 - On-the-job training projects must be informed by work at the Energy Commission and the CPUC to implement AB 758. (For example, see the *Existing Buildings Energy Efficiency Action Plan - Draft* posted March 6, 2015: <http://www.energy.ca.gov/ab758/>)
- Provide training for workers to install and provide feedback on the performance and reliability of advanced energy efficiency measures (e.g., high performance lighting and controls, advanced building envelope sealing technologies, information systems that identify sub-optimal operation of equipment, energy recovery ventilation, heat recovery ventilation, and other energy efficiency methods of providing ventilation).
- Propose a qualified team with the capabilities and resources that demonstrates workforce development expertise (e.g., a track record of successful job placement), and established communication channels with industry partners, as well as federal, state, and local workforce providers.
- Provide trainees with income while they learn new skills to enhance career development.



Group 2: Project Narrative Minimum Requirements

Project Narratives (Attachment 4) should provide a description for each of the following:

- A plan to recruit trainees from disadvantaged communities, including providing recruiting materials and training in languages necessary to communicate effectively with the trainees.
- The advanced energy efficiency technologies, systems, and construction methods that will be used during the training; and the building and property types where they will be installed.
- How to ensure the work product complies with applicable health and safety codes and that the workers have:
 - Applicable trade-related certifications to participate in on-the-job training.
 - Knowledge of practices and procedures to maintain a safe work environment.
- Identification of funding sources (e.g., employer and other match funding, if applicable), to provide trainees with income during the training.



Group 2: Project Narrative Minimum Requirements

- Partnerships involved with the proposed training, such as commitments from equipment manufacturers to provide or donate equipment, information, and assistance to facilitate access to the best available information and feedback from the training locations to equipment manufacturers on installation practices and procedures for the advanced energy efficiency measures included in the training.
- How to leverage other regional workforce development programs that bring together employers, accredited training providers, community organizations, and local government.
- Identification of the buildings and properties that will serve as on-the-job training sites for the installation of the technologies and systems targeted by the proposed training.
 - Projects must be located in disadvantaged communities (as defined by SB 535).



Group 2: Project Narrative Minimum Requirements

- When applicable, describe the training (e.g., information and maintenance service programs) for trainees and building occupants on how to operate the systems and ensure sustained savings. Also, describe community engagement forums for building occupants, when applicable.
- A measurement and verification plan that specifies a team of qualified, independent performance testers with the expertise needed to conduct the following analysis:
 - Assess whether the technologies used in on-the-job training opportunities are installed and operating according to required design specifications.
 - Measure building energy use before and after the training/installation, determine whether actual energy savings resulted from the installations, and compare actual savings to projected savings (for on-the-job training).
 - Make recommendations for installation improvement or additional training.
- A proposed plan to sustain the training beyond the term of the agreement, including a description of recruiting building owners to participate as project sites for future on-the-job training opportunities for advanced energy efficiency measures.



Application Requirements

- Submit Applications with all attachments in the order specified by the due date and time listed in Section III of the manual.
- Application documents should meet formatting requirements, page limits, and number of copies specified on page 20.
 - **Five** hard copies and **one** electronic copy.
- Evaluation Consists of Two Parts
 - Part 1 – Application Screening (Section E, page 28-29).
 - Part 2 – Application Scoring (Section F, pages 31-35).



Application Requirements

Each Applicant must complete and include the following:

1. Application Form	7. Budget
2. Executive Summary	8. CEQA Compliance Form
3. Fact Sheet	9. References and Work Product
4. Project Narrative	10. Contact List
5. Project Team	11. Commitment and Support Letters
6. Scope of Work	



Application Form (Attachment 1)

- Form provides the Energy Commission with basic information about the Applicant and project.
- Must include all information requested.
- Must be signed by an authorized representative of the Applicant's organization.
- Information provided should be consistent with project budget, narrative, and letters of commitment.



Executive Summary Form (Attachment 2)

- Executive Summary should summarize the information included in the project narrative.
- Must include:
 - Project description.
 - Project goals and objectives.
 - Explanation of how the goals and objectives will be achieved, quantified, and measured.
 - Description of the project tasks.
 - Overall management of the agreement.
- Limited to two pages.



Fact Sheet Template (Attachment 3)

- Must present project information in a manner suitable for publication (if funded this sheet may be used to publicize).
- The fact sheet must follow the template provided, including:
 - A description of the issue addressed by the project.
 - A project description.
 - Anticipated benefits for the State of California.
 - A summary of project specifics.
- Limited to two pages.



Project Narrative (Attachment 4)

- The Project Narrative form follows the Application Scoring Criteria (pages 31-35).
- Include a detailed description of the proposed project and respond to the information requested in each of the following areas:
 1. Technical Merit and Need.
 2. Technical Approach .
 3. Impacts and Benefits for California IOU Ratepayers.
 4. Team Qualifications, Capabilities and Resources.
 5. Budget and Cost-Effectiveness.
 6. Funds Spent in California.
 7. Ratio of Direct Labor and Fringe Benefit Rates to Loaded Labor Rates.
 8. Match Funding Above the Minimum (optional).
- Provide sufficient detail so that reviewers will be able to evaluate the proposal against each of the scoring criteria.
- Limited to twenty pages.



Project Team Form (Attachment 5)

- Must identify all key personnel assigned to the project.
 - “Key personnel” are individuals that are critical to the project due to experience, knowledge, and/or capabilities.
- Clearly describe each individual’s areas of responsibility.
 - Limited to one page per individual.
- Include a resume for each individual.
 - Limited to two pages, double-sided.



Scope of Work (Attachment 6)

- Ensure that the Problem/Solution Statement and Goals and Objectives are consistent with the Project Narrative.
- The following tasks are mandatory; do not revise them, except to update the numbers for the tasks with “TBD” in the task number:
 - Task 1: General Project Tasks.
 - Task TBD-1 Evaluation of Project Benefits.
 - Task TBD-2 Technology/Knowledge Transfer Activities.
- Task 2 is the first of the technical tasks.
- Indicate specific action items in the “Recipient Shall” section (these should be major items).
- “Products” are documents, plans, and reports (tangible items that can be submitted to the CAM).
- “Products” are not equipment and other items that cannot be delivered and stored at the Energy Commission.



Project Schedule (Attachment 6a)

- Provide meeting and product titles and the due dates.
- All of the products must match meeting and product titles shown in the Scope of Work (Attachment 6).
- Products for each non-TBD technical task, must be due to the CAM, no later than two months prior to the end of the agreement term.
 - Exceptions must be approved by the CAM, prior to the end of the term.



Budget (Attachment 7)

Each Applicant and major subcontractor must complete and include the budget forms as specified in the budget form directions:

- ✓ Category Budget
- ✓ Task Budget
- ✓ Direct Labor
- ✓ Fringe Benefits
- ✓ Travel
- ✓ Equipment
- ✓ Materials & Miscellaneous
- ✓ Subcontracts
- ✓ Indirect Costs & Profit
- ✓ Rates Summary (Attachment-7a, for evaluation purposes only)

**Don't delete sheets or rows;
use the hide/expand function
The shaded cells are
automatically filled with
information from other
pages in the workbook**

The Applicant must submit information on **all** of the attached budget forms, and in the format required.



California Environmental Quality Act (CEQA) Compliance Form (Attachment 8)

- The information provided will help facilitate Energy Commission’s environmental evaluation of the proposed project under CEQA.
- This form must be completed regardless of whether the proposed activities are considered a “project” under CEQA.
- All sections of the form must be completed.
- Failure to complete CEQA process in a timely manner may result in cancellation of the award.



Reference and Work Product Form (Attachment 9)

This form contains two sections:

- **Section 1: References**
 - Provide Applicant and subcontractor references as instructed.
 - Include three references for Applicant and two for each subcontractor.
- **Section 2: Work Products**
 - Provide a list of up to three past projects detailing technical and business experience of the Applicant or team member (two pages maximum per project).
 - Include copies of up to three recent relevant technical publications.



Contact List Template (Attachment 10)

- Identify the names and contact information of the project manager, administrator, accounting officer, and recipient of legal notices.
- Applicant should complete the information in the “Recipient” column shown in blue text.
- Energy Commission staff will complete the information in the “California Energy Commission” column.



Commitment and Support Letter Form (Attachment 11)

- This form provides guidelines for the submission of letters of support or commitment that are submitted with the application.
 - Commitment letter commits an entity or individual to providing the service or funding described.
 - Support letter details an entity's or individual's support for the project .
- All Applicants are required to submit at least one support letter from a project stakeholder.
- Any project partners that will make other contributions to the project must submit a commitment letter.
- Match funding for each Application must be supported by a match fund commitment letter.
- Limited to two pages per letter, excluding the cover page.



Technical Merit and Need

- Describe the goals, objectives, technological or scientific knowledge advancement, and innovation in proposed project.
- Describe how the project will lead to technological advancement and breakthroughs that overcome barriers to achieving the state's energy goals.
- Summarize the current status of the relevant technology and explain how project will advance, supplement, and/or replace current technology and/or scientific knowledge.
- Justify need for EPIC funding, and explain why proposed work is not adequately supported by competitive or regulated markets.
- Discuss how proposed work is technically feasible and achievable.
- Include a plausible measurement and verification plan that describes how energy savings and other benefits specified in the application will be determined and measured.



Technical Approach

- Describe the technique, approach, and methods to be used in performing the work listed in the Scope of Work, highlighting any outstanding features.
- Describe how tasks will be executed and coordinated with various participants and team members.
- Identify and discuss factors critical for success, in addition to risks, barriers, and limitations. Provide a plan to address them.
- Describe how the knowledge gained, experimental results, and lessons learned will be made available to the public and key decision-makers.
- Include a complete Scope of Work and Project Schedule, as instructed in Attachment 6 and 6a.



Impacts and Benefits for California IOU Ratepayers

- Explain benefits to California Investor-Owned Utility (IOU) ratepayers with respect to EPIC goals: greater reliability, lower costs, and/or increased safety.
- Provide quantitative estimates of potential benefits for IOU ratepayers.
- State timeframe, assumptions, and calculations for estimated benefits, and explain reasonableness.
- Identify CA impacted market segments, including size, penetration, or deployment rates, as well as underlying assumptions.
- Discuss qualitative or intangible benefits to IOU ratepayers, including timeframe and assumptions.
- Provide cost-benefit analysis comparing project costs to anticipated benefits, explain how costs and benefits will be calculated and quantified, and identify assumptions (Attachment 12).



Team Qualifications, Capabilities, and Resources

- Describe the organizational structure of the Applicant and the project team. Include an organizational chart that illustrates the structure.
- Identify key team members, including the project manager and principal investigator (Attachment 5).
- Summarize qualifications, experience, capabilities, and credentials of the key team members (Attachment 5).
- Explain how the various tasks will be managed and coordinated, and how the project manager's technical expertise will support the effective management and coordination of all activities described in the application.
- Describe the facilities, infrastructure, and resources available to the team.
- Describe the team's history of successfully completing projects and commercializing and/or deploying results/products.



Team Qualifications, Capabilities, and Resources

- Identify past projects that resulted in a market-ready technology (Attachment 9).
- Provide current and relevant references from work completed within the past three years (Attachment 9).
 - Complete a new Client Reference Form for each reference.
- Identify any collaborations with utilities, industries, or others. Explain the nature of the collaboration and what each collaborator will contribute.
- Demonstrate that the Applicant has the financial ability to complete the project, as indicated by responses to the financial ability questions on page 33.
- Provide support or commitment letters (for match funding, test sites, or project partners), indicating a strong level of support or commitment for the project.



Budget and Cost-Effectiveness

- Include all budget forms completed as instructed in Attachment 7.
- Justify the reasonableness of requested funds relative to the project goals, objectives, and tasks.
- Justify the reasonableness of costs for direct labor, non-labor (e.g., indirect overhead, general and administrative costs, and subcontractor profit), and operating expenses by task.
- Explain why the hours proposed for personnel and subcontractors are reasonable to accomplish the activities in the Scope of Work.
- Explain how the Applicant will maximize funds for the technical tasks in the Scope of Work and minimize expenditure of funds for program administration and overhead.



EPIC Funds Spent in California

- Projects that spend EPIC funds in California will receive up to 15 points as indicated in the table below. “Spent in California” means that: (1) Funds under the “Direct Labor” category and all categories calculated based on direct labor in the budget attachments (Prime and Subcontractor Labor Rates) are paid to individuals who pay California state income taxes on wages received for work performed under the agreement; and (2) Business transactions (e.g., material and equipment purchases, leases, rentals, and contractual work) are entered into with a business located in California.

Percentage of EPIC funds spent in CA	Percentage of Possible Points
>60%	20%
>70%	40%
>80%	60%
>90%	80%
>100%	100%

- Airline ticket purchases and payments made to out-of-state workers are not considered funds “spent in California.” However, funds spent by out-of-state workers in California (e.g., hotel and food) are considered funds “spent in California.”



Ratio of Direct Labor and Fringe Benefit Rates to Loaded Labor Rates

The score for this criterion will derive from the Rates Summary worksheet in the budget forms, which compares the weighted direct labor and fringe benefits rate to the weighted loaded rate. This ratio, as a percentage, is multiplied by the possible points for this criterion.



Match Funding

- Match funding of **50%** of requested EPIC funds is required. Scoring criteria and points only apply to match funding commitments **above minimum required**.
- Applicants may receive up to 10 additional points based on the criteria below:
 - Up to 5 points will be awarded based on the percentage of match funding that **exceeds the minimum match funding amount**. This ratio will be multiplied by 5 to yield the points, and rounded to the nearest whole number.

For example: If requested EPIC funds are \$1,000,000, the Applicant must provide at least \$500,000 (50% of \$1,000,000) in match funding. If \$800,000 is provided in match funding, the amount that will be evaluated for additional points is \$300,000. The match funding ratio is 0.3. ($5 \times 0.3 = 1.5$, rounded to the nearest whole number is 2). The Applicant will be awarded 2 additional points.
 - The remaining 5 points will be based on the level of commitment, type of match funding, dollar value justification, and funding replacement strategy described in the match funding commitment letter (see Attachment 11). The application scoring scale on page 30 will be used to rate these criteria.



Match Funding

- Match funding contributors must submit match funding commitment letters that meets the requirements of Attachment 11. Failure to do so will disqualify the application.
- Match funding pledged in Attachment 1 must be consistent with the amount or dollar value described in the commitment letter(s) (e.g., if \$5,000 “cash in hand” funds are pledged in a commitment letter, Attachment 1 must match this amount).



How will my Application be Evaluated?

→ Administrative Screening

Application Admin Screening Process

1. Energy Commission staff screens applications per criteria in the solicitation (pages 28-29).
2. Criteria is evaluated on a pass/fail basis.
 - ✓ Applicants must pass all screening criteria or the Applicant will be disqualified.

Some Reasons for Failing Screening

- ✓ Application not submitted by the specified due date and time.
- ✓ Applicant did not address one of the eligible project groups.
- ✓ Requested funding is outside of the specified minimum/maximum range.
- ✓ Project completion date beyond the specified agreement end date.
- ✓ Application does not include one or more support letters, as described in Attachment 11.
- ✓ Application contains confidential material.



What is the Technical Scoring Scale?

% of Possible Points	Interpretation	Explanation for Percentage Points
0%	Not Responsive	Response does not include or fails to address the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
10-30%	Minimally Responsive	Response minimally addresses the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
40-60%	Inadequate	Response addresses the requirements being scored, but there are one or more omissions, flaws, or defects or the requirements are addressed in such a limited way that it results in a low degree of confidence in the proposed solution.
70%	Adequate	Response adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable.
80%	Good	Response fully addresses the requirements being scored with a good degree of confidence in the Applicant's response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable.
90%	Excellent	Response fully addresses the requirements being scored with a high degree of confidence in the Applicant's response or proposed solution. Applicant offers one or more enhancing features, methods or approaches exceeding basic expectations.
100%	Exceptional	All requirements are addressed with the highest degree of confidence in the Applicant's response or proposed solution. The response exceeds the requirements in providing multiple enhancing features, a creative approach, or an exceptional solution.



How will my Application be Evaluated?

- Evaluation Committee applies the scoring scale to the scoring criteria.
- Applications must obtain a minimum passing score of 70% for criteria 1-4 (or 49 points) in order to continue evaluation, and must also obtain a minimum passing score of 70% overall for criteria 1-7 (or 70 points), in order for an Application to be considered for funding.
- Each Applicant must review the Evaluation and Award Process section of the solicitation and ensure that the application provides a clear and complete response to each scoring criteria in the project narrative.

Scoring Criteria (pages 31-35)	Maximum Points
1. Technical Merit and Need	20
2. Technical Approach	20
3. Impacts and Benefits for CA IOU Ratepayers	20
4. Team Qualifications, Capabilities and Resources	10
5. Budget Cost-Effectiveness	10
6. EPIC Funds Spent in CA	15
7. Ratio of Direct Labor and Fringe Benefit Rates to Loaded Labor Rates	5
Total	100
Minimum points to pass	70



Grounds for Rejection

- An application may be rejected by the Energy Commission for the following reasons stated on pages 26-27, including:
 - ✓ Application contains false or misleading statements.
 - ✓ Application is intended to mislead the State in its evaluation.
 - ✓ The application does not comply with the solicitation requirements.
 - ✓ The application does not contain sufficient information to enable a useful evaluation.
 - ✓ The application contains confidential information.
 - ✓ Applicant is not in compliance with royalty provisions from previous Energy Commission awards.
 - ✓ Applicant has received unsatisfactory evaluations from the Energy Commission or another California state agency.
 - ✓ Applicant has not demonstrated financial capability to complete the project.
 - ✓ Applicant is a business that is not in good standing with the California Secretary of State.
 - ✓ The application is not submitted in the format specified.
 - ✓ The project end date extends past the anticipated agreement end date specified in the “Key Activities Schedule” in the solicitation.



Other Information

- **Solicitation documents and today's presentation:**
www.energy.ca.gov/contracts/epic.html#GFO-15-302
- **Sign up for the Listserver by selecting "Opportunity":**
www.energy.ca.gov/listservers/
- **Information on EPIC:**
www.energy.ca.gov/research/epic/index.html
- **Information on other EPIC solicitations:**
www.energy.ca.gov/contracts/epic.html



Questions and Answers

Please send all related questions in written form to:

Crystal Presley-Willis
Commission Agreement Officer

1516 Ninth Street, MS-18

Sacramento, CA 95814

(916) 654-5067

(916) 654-4423 (fax)

Crystal.Presley-Willis@energy.ca.gov

Deadline to submit questions is April 2, 2015

5:00 PM PDT!