

REQUEST FOR QUALIFICATIONS – FOR THE CALIFORNIA TECHNICAL FORUM (CAL TF)

TECHNICAL FORUM MEMBERS (TF MEMBERS)

Proposal Due: Friday, March 21st, 2014 at 5 pm PST

A. Overview

This Request for Qualifications (“RFQ”) is to solicit technical experts who are qualified to provide peer review of energy efficiency savings estimates and other measure parameters to serve a one-year term on a new California technical collaborative, the California Technical Forum (Cal TF). The Cal TF involves the California Investor-Owned Utilities (IOUs), the Publically-Owned Utilities (POUs), the Regional Energy Networks (RENs), Local Government Partnerships (LGPs), the Community Choice Aggregator (CCA), state regulators (the California Public Utilities Commission (CPUC) and the California Energy Commission (CEC)), the California Independent System Operator (CAISO) and others (program implementers, a ratepayer advocate, and an environmental advocate). The purpose of this new technical collaborative is to develop measure-level energy savings and other measure parameters, such as expected useful lives (EULs), incremental measure costs (IMC), net-to-gross ratios (NTG) for energy efficiency measures. The process is expected to yield energy efficiency measure savings estimates and other measure parameters that are:

- Technically rigorous and unbiased
- Statewide consistent
- Transparent (readily-available documentation of how the values were derived)

In addition, the process will include and yield:

- Collaboration
- Peer review
- Timely results
- A national model for developing *ex ante* values

The initial term of the Technical Forum will begin in May 2014 and last for one year. Technical Forum positions are voluntary. Selected Technical Forum Members (TF Members) will meet monthly to review, comment on, and seek to reach consensus on technical values and information related to energy efficiency measures that can be trusted and used by all energy efficiency stakeholders in California. TF Members will be expected to review materials before the regularly-scheduled monthly meetings. Meetings will be held monthly in San Francisco, California. **For the initial phase, the Cal TF will focus on soliciting recommendations for new measures, and developing and reviewing measure parameters for new measures that may be introduced into California’s energy efficiency portfolio.**

Selected TF Members will have the opportunity to recommend, peer review and comment on new and innovative energy efficiency measures for consideration in California’s energy efficiency portfolio. They will interact with technical experts from within and outside California so the best available knowledge, methodologies and data are used to develop *ex ante* values for new measures. Finally, Cal TF is expected to lead to a national model for developing technically rigorous, transparent *ex ante* values for energy efficiency measures.

B. Mission

The Technical Forum will be a collaborative of technical experts who use independent professional judgment and a transparent, unbiased, technically rigorous process to develop and/or review measure-level energy savings, other measure parameters (such as measure costs and expected useful lives) and other technical information related to the California energy efficiency portfolio.

C. TF Member Work Duties/Time Commitments

TF Members will review, comment on and seek to reach consensus, where possible, on energy efficiency measure-level savings and other measure-level parameters to produce timely, well-documented, unbiased and technically-rigorous information that can be used statewide in California's energy efficiency portfolio by all California administrators and implementers. The measure-level parameters could include energy impacts, expected useful lives, net-to-gross ratios, incremental costs, and data sources and/or methodologies. TF Members will also be asked to recommend new measures for consideration by the TF.

TF Members will be expected to review and comment on technical information that will be circulated monthly, then participate in a day-long meeting (generally 10:30 – 4:30) to discuss and resolve, through consensus decision-making, measure-level energy savings and other relevant measure parameters. Monthly meetings will be held in San Francisco, California. Participants are encouraged to attend in person, but participation via teleconference is allowed, except for the first meeting which must be attended in-person.

In addition to their participation in monthly meetings TF Members may participate in other activities during the course of service, such as:

- Proposing other new measures for consideration by the TF for inclusion in the California energy efficiency portfolio.
- Participating in TF “subcommittees” that review more detailed technical information related to a particular measure or measure parameter.

TF Members are expected to serve in an individual capacity and not as a representative of their affiliates, organization or business. In addition, TF Members will need to identify whether they have a conflict of interest or perceived conflict of interest related to technical matters discussed through the Technical Forum.

D. TF Member Benefits

While participation is voluntary and uncompensated (except for travel expenses for select members, as described below), TF Members will be making important contributions to the evolution and future of California's energy efficiency portfolio. In addition, they will have the opportunity to:

- Learn about and help analyze new and innovative measures;
- Recommend new measures for consideration in the California portfolios;
- Meaningfully engage with other technical experts with a broad range of skills, experience and perspective; and
- Contribute to a national model for developing ex ante values.

E. Eligibility Criteria

Technical Forum Members will conduct peer-review of technical information and, at a minimum, must have the following qualifications to serve as a TF Member:

Education:

- Technical degree in engineering, sciences, or math (preferably for an advanced degree in one of the fields listed).

Professional Experience/ Direct Expertise

- Five (5) years' experience in the energy efficiency industry.

Other

The following other qualifications are sought, but not required:

- Prior experience developing or reviewing energy efficiency measures.
- Prior experience with energy efficiency-related collaboratives.

F. TF Member Restrictions

Technical Forum Members are restricted from bidding on any government contracts or grants that directly result from TF discussions. This includes any follow-up research and EM&V on any measures where the workpaper was developed or reviewed by the TF.

- **[NOTE: The language above is from Commission staff, slightly modified. It must be clarified or narrowed, or potential participants will likely not want to participate, as they will not want to participate in a volunteer collaborative that could bar them from future CPUC/government work].**

G. Submittal Requirements and Process

Qualified and interested individuals willing to commit the necessary time to participate as a TF Member shall submit the following items:

1. **Cover Letter:** A letter of interest, which includes a statement of why the applicant would like to be a TF member. The letter may highlight key qualifications or experience that would make the applicant a strong member of the TF.
2. **Resume:** Resume that identifies relevant experience, and time periods of relevant experience.
3. **Recent Publications:** A listing of recent relevant publications and/or projects in which the applicant played a significant technical role. For each project or publication, the applicant should provide a short summary of his or her role in the project or publication.
4. **Experience with Developing Energy Efficiency Measure Values:** Whether applicant has been involved in developing or reviewing energy efficiency measure values, including number of years applicant participated in the development and/or review of such values.
5. **Collaborative Experience:** Whether the applicant has participated in an energy efficiency-related collaborative, details of participation, and number of years participated.
6. **Request for Compensation:** Request for compensation for travel expenses, if needed, as described below,
7. **Contact information** (Name, Title, Organizational Affiliation, Address, Phone and E-mail).

Applicants must indicate whether their participation in the day-long, monthly meetings will generally be in-person (San Francisco, California) or via telephone/webinar. The first Cal TF meeting must be attended in-person by all TF Members. For TF Members whose travel expenses would not be compensated by their employer, TF Members may receive re-imbursement for travel for the purpose of attending Technical Forum meetings. Applicants should identify whether their participation is contingent upon receiving reimbursement for travel costs.

Qualifications are due **via e-mail by Friday, March 21st, 2014 at 5 pm**. Below is information about the proposal due date, time due, and method for submission

Due Date:	Friday, March 21 st , 2014
Time Due:	5:00 pm Pacific Standard Time
Email:	TFMembers@CalTF.org
Email Subject Line:	Potential Cal TF Member Qualifications

Note: During the submittal period, outreach will continue to potential TF Members to ensure a strong pool of candidates to choose from.

H. Question and Answer Period

Applicants may submit questions until March 14th, 2014 to: TFMembers@CalTF.org. All applicant questions will be answered and will be shared with other applicants. Applicants may receive follow-up questions on the material they submitted.

I. Proprietary Material

The applicant shall clearly identify any proprietary information included in its submittal as such. Evaluators will need to agree to hold the material in confidence and destroy it after the evaluation process closes.

K. Evaluation Goals, Criteria and Process

With this RFQ, the Cal TF seeks to fill twenty to thirty (20 - 30) TF Member positions. The Cal TF seeks TF Members who bring a balance of technical expertise, sector experience (e.g. commercial, agriculture, etc...), technology focus (e.g. lighting, HVAC, etc...), and different institutional experience. The majority of TF Members must be non-IOU.

Responses will be evaluated by the Cal TF committee responsible for selecting the TF Members. The evaluators may represent California Investor-Owned Utilities (IOUs), Publically-Owned Utilities (POUs), Regional Energy Networks (RENs), Local Government Partners, Community Choice Aggregators (CCAs), Environmental Groups and/or Ratepayer Advocates. Evaluators will not include program implementers or program implementer representatives to ensure that applicant's information is not shared with others who may compete with applicant or applicant's organization on other projects. The evaluators will be selecting members to get a balance of participants representing a broad range of sector and technical experience and institutional background.

J. Term of Service

TF Members will serve for a period of one-year effective from the date of the first in-person meeting in San Francisco, California. After the one-year period, the TF Member may be re-appointed for

successive two-year terms without limitation if they are interested. TF Members may resign at any time, but are asked to make a one-year commitment unless extenuating circumstances arise which bar completing the first year term.

K. Obligations

TF Members will sign a Code of Independence/Code of Conduct, in which they pledge to carefully and thoroughly review, in advance of a vote, materials that are circulated for TF Member vote, and a Conflicts Policy, which requires that TF Members vote based on their best professional judgment and not their organizational interest, and also identify conflicts of interest or perceived conflicts of interest relating to technical matters discussed at the Technical Forum.

Attachments

Cal TF Code of Conduct/Code of Independence

Cal TF Conflicts of Interest