

# City of Berkeley Climate Equity Fund RFP - Bidders' Webinar

Solicitation No. 22-11488-C

December 13, 2021



# Meeting Logistics



- **This meeting will be recorded** and posted at: <https://www.cityofberkeley.info/RFP/> for RFP No. 22-11488-C
- **Rename yourself** as you would like your name to be recorded
- **Please mute yourself**, and only unmute when called on to ask a question



**Welcome**

Climate Equity Fund Program Background

RFP Overview and Timeline

Questions & Answers

Closing



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# Climate Equity Fund Background



- **Goal:** Provide climate and resilience benefits to low-income residents for building and transportation electrification
- **Climate Equity Action Fund** established July 27, 2021 with \$600,000 to fund projects over next two years
- Funding aligns with the City's resilience goals of:
  - Racial equity
  - Health and safety improvements
  - Meeting ambitious greenhouse gas reduction targets
  - Adapting to the changing climate

# Equity Guardrails



**MAXIMIZE ACCESS  
TO HEALTH,  
SAFETY &  
MOBILITY  
BENEFITS**



**MAXIMIZE ACCESS  
TO ECONOMIC  
BENEFITS**



**MAXIMIZE EASE  
OF  
PARTICIPATION**



**PROMOTE HOUSING  
AFFORDABILITY &  
ANTI-  
DISPLACEMENT**



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# RFP Overview



- **RFP Solicitation Document:** Includes all City requirements & form templates
- **Attachment J:** Application form to be submitted as proposal. Please do NOT provide a separate proposal form

Sections	Who needs to complete it?
<b>Section A:</b> Mandatory Questions	<u>All bidders</u> must complete this section
<b>Section B: Program Area #1</b> – Resilient Home Retrofit Pilot	Only those applying for funding in Program Area #1
<b>Section C: Program Area #2</b> – Electric Mobility Access Pilot	Only those applying for funding in Program Area #2
<b>Section D: Program Area #3</b> – Community Access to Resilience Measures & Electrification Engagement Pilot	Only those applying for funding in Program Area #3



# Attachment J – Application Form

- Section A: Mandatory – *everyone* must fill this out (2 pages)

## A. Mandatory Questions (All Bidders Must Complete this Section)

### 1. Organization/Team Identification:

A. Please provide the following information for lead applicant:

Name of lead organization	Provide response here
Lead organization's tax identification number	Provide response here
Lead organization's principal place of business (address)	Provide response here
Lead contact name	Provide response here
Lead contact telephone number	Provide response here
Lead contact email	Provide response here

B. If you are applying as a team, please provide the following information each of the additional team members please provide the following (if more than one additional organization, copy/paste the table for additional organizations):

Organization name:	Provide response here
Organization's principal place of business (address):	Provide response here
Contact name:	Provide response here
Contact telephone number:	Provide response here
Contact email	
Role of organization on the team:	Provide response here

### 2. Client References:

Provide a minimum of three client references. If possible, references should be local government or community-based agencies serving low-income residents or program funders. Provide the designated person's name, title, organization, address, telephone number, and the project(s) that were completed under that client's direction.

Provide response here

### 3. Contract Terminations:

If your organization has had a contract terminated in the last five (5) years, describe such incident. Termination for default is defined as notice to stop performance due to the vendor's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the vendor, or (b) litigated and such litigation determined that the vendor was in default.

Submit full details of the terms for default including the other party's name, address, and phone number. Present the vendor's position on the matter. The City will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience.

If the firm has not experienced any such termination for default or early termination in the past five (5) years, so indicate.

Provide response here

### 4. Program Area Proposal(s)

Please only fill out the section(s) relevant to your application. For example, if you are only applying for one program area, you only need to fill out the questionnaire for that program area.

# RFP Checklist



Attachment J: Berkeley Climate Equity Fund Proposal Application:

Section A completed

Sections B, C and/or D- Only the sections that you are applying for funding completed

**AND** the following forms, completed and **signed in blue ink**:

Non-Discrimination/Workforce Composition Form

Attachment B

Nuclear Free Disclosure Form

Attachment C

Oppressive States Form

Attachment D

Sanctuary City Compliance Statement

Attachment E

Living Wage Form (may be optional)

Attachment F

Equal Benefits Certification/EBO-1 (may be optional)

Attachment G

# Submission



- Scan all signed documents and forms from the checklist (Attachments B-G, J-Proposal)
  
- Email submission as a PDF file(s) to:  
[purchasing@cityofberkeley.info](mailto:purchasing@cityofberkeley.info) no later than the deadline of **Tuesday, January 25, 2022 at 2:00 pm**



# Questions



- Send any questions to [electric@cityofberkeley.info](mailto:electric@cityofberkeley.info) through January 7, 2022
- Answers to all questions from today and submitted via email will be posted online at: <https://www.cityofberkeley.info/RFP/> for RFP No. 22-11488-C



# Proposed Categories of Fund Expenditure



**Program Area 1: Resilient Home Retrofit Pilot**



**Program Area 2: Electric Mobility Access Pilot**



**Program Area 3: Community Access to Resilience Measures and Electrification Engagement Pilot**

# Program Area #1: Resilient Home Retrofit Pilot



Seeks to support building decarbonization that enhances resilience, supports occupants and reduces greenhouse gas emissions

**Proposed projects** should leverage other income-qualified programs serving low-income households in single family and/or multifamily buildings. Homes being served must be in Berkeley.

**Eligible applicants:** Organizations that provide rehabilitation, capital improvements, weatherization, and/or energy services for income-qualified single and/or multifamily housing

# Program Area #1: Resilient Home Retrofit Pilot



**Examples of eligible expenses:** Labor and equipment for building envelope improvements, solar photovoltaic systems, induction ranges, heat pump water heaters, and/or heat pump air space heating/cooling, and related work for buildings with income-qualified residents

Funding for approved projects will be drawn down from the total amount of **\$250,000**. Approved projects may receive partial funding in advance.

# Program Area #1: Resilient Home Retrofit Pilot



## Section B: Berkeley Pilot Climate Equity Fund Program Area #1 RESILIENT HOME RETROFITS

### Description of Program Area #1:

The Resilient Home Retrofit Pilot seeks to support building decarbonization that enhances resilience, supports occupants and reduces GHG emissions. The Berkeley Existing Buildings Electrification Strategy identified home repair and maintenance needs that accompany building electrification as a major challenge to decarbonizing existing residential buildings in Berkeley. While there are some resources to support these repairs for income-qualified homes, it is difficult for low-income residents to access multiple programs that have different application processes and eligibility requirements. This program area seeks to demonstrate how retrofit funding available to income-qualified households can be combined with other programs to leverage greater benefits.

Proposed projects should integrate electrification and energy efficiency measures with other income-qualified housing improvement programs serving low-income households in single family and/or multifamily buildings. Homes being served must be in Berkeley. Examples of eligible expense for this program area include labor and equipment for building envelope improvements, solar photovoltaic systems, induction ranges, heat pump water heaters, and/or heat pump air space heating/cooling, and related work for buildings with income-qualified residents.

Selected proposers will request funding based on specific scopes of work, which will be reviewed by the City. Once approved, projects may receive partial funding in advance with the balance reimbursed upon completion. Funding for approved projects will be drawn down from the total amount of dedicated funding for this program area. Total funding available for Program Area #1 is \$250,000.

Eligible applicants for Program Area #1: Resilient Home Retrofit Pilot include organizations that provide rehabilitation, capital improvements, weatherization, and/or energy services for income-qualified single and/or multifamily housing.

*Please only fill out this section if you are applying for funding under this category. Please keep responses brief and succinct.*

1. Organization or Team's Capacity and Readiness to Proceed Up to 23 points

A. Provide a list of the proposed project staff, including name, title, and role.

[Provide response here]

B. List any residential building programs/services your organization/team provides and indicate the number years of service.

[Provide response here]

Attachment J, Section B –  
**ONLY** fill this out if you are  
applying for funding from this  
area



# Program Area #2: Electric Mobility Access Pilot



Seeks to enhance mobility for low-income community members in ways that reflect community priorities and support transportation modal shifts, consistent with *Berkeley Electric Mobility Roadmap* to:

- Ensure equity in access to electric mobility
- Improve alternatives to driving
- Achieve zero carbon emissions

**Proposed projects** should demonstrate how increased access to bicycles, electric bicycles, electric scooters, or other forms of micromobility can support low-income residents in Berkeley

**Eligible applicants:** Community-based organizations serving income-qualified community members

# Program Area #2: Electric Mobility Access Pilot



**Examples of eligible expenses:** Community engagement and partnership, equipment, operating costs, printing materials, community events, and/or staff time for program design and implementation

Total funding is **\$250,000**. Budgets must be itemized.

# Program Area #2: Electric Mobility Access Pilot



## Section C: Berkeley Pilot Climate Equity Fund Program Area #2 ELECTRIC MOBILITY ACCESS PILOT

The Electric Mobility Access Pilot seeks to enhance mobility for low-income community members in ways that reflect community priorities and support transportation modal shifts. Goals for this program area are consistent with those of the *Berkeley Electric Mobility Roadmap*<sup>1</sup>:

- Ensure equity in access to electric mobility
- Improve alternatives to driving
- Achieve zero carbon emissions

Proposed projects should demonstrate how increased access to bicycles, electric bicycles, electric scooters, or other forms of micromobility can support low-income residents in Berkeley. Examples of eligible expenses for this program area include costs related to community engagement and partnership, equipment purchases, operating costs, printing materials, community events, and/or staff time for program design and implementation.

Total funding for Program Area #2 is \$250,000. Budgets must be itemized.

Eligible applicants for Program Area #2: Electric Mobility Access Pilot include community-based organizations serving income-qualified community members.

*Please only fill out this section if you are applying for funding under this category. Please keep responses brief and succinct.*

### 1. Organization Capacity and Readiness to Proceed Up to 23 points

A. Briefly describe what services your organization and/or project team currently provides to income-qualified people that would be relevant for this project.

[Provide response here]

B. Provide a list of the proposed project staff, including name, title, and role.

[Provide response here]

### 2. Project Feasibility Up to 26 points

A. Provide a brief description of the proposed project, including other leveraged programs/funding sources, and number of people served.

[Provide response here]

Attachment J, Section C –  
**ONLY** fill this out if you are  
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area

# Program Area #3: Community Access to Resilience Measures & Electrification Engagement Pilot



Goal is to meaningfully engage low-income community members in Berkeley to amplify their voices, elevate their experiences and build their capacity to collaborate as partners in developing and implementing climate change and resilience solutions

**Proposed projects** should demonstrate ways to build capacity and resilience in low-income communities, and provide access to measures and resources that address priorities that they have identified

**Eligible applicants:** Community-based organizations serving income-qualified community members in Berkeley

# Program Area #3: Community Access to Resilience Measures and Electrification Engagement Pilot



## Examples of eligible expenses:



- Providing access to resilience measures such as induction cooktop hobs, portable batteries, air purifiers, transit passes, shared electric mobility memberships, etc.
- Conducting outreach, education and community engagement to build relationships and identify community priorities around health, transportation, air quality, etc.
- Building capacity for organizations and individuals representing low-income communities to engage around climate and resilience by providing mini-grants or stipends

Total funding is **\$100,000**. Budgets must be itemized.

# Program Area #3: Community Access to Resilience Measures and Electrification Engagement Pilot



## Section D: Berkeley Pilot Climate Equity Fund Program Area # 3 COMMUNITY ACCESS TO RESILIENCE MEASURES AND ELECTRIFICATION ENGAGEMENT PILOT

Communities of color and other historically marginalized people continue to suffer harms from racism and other forms of oppression, including increased risks of experiencing the impacts of climate change first and worst. The objective of the Community Access to Resilience Measures and Electrification Engagement Pilot is to meaningfully engage low-income community members in Berkeley to amplify their voices, elevate their experiences and build their capacity to collaborate as partners in developing and implementing climate change and resilience solutions.

Proposed projects should demonstrate ways to build capacity and resilience in low-income communities, and provide access to measures and resources that address priorities that they have identified. Examples of eligible expenses in this program area include:

- Providing access to resilience measures through the purchase and distribution of electrification and resilience resources and equipment such as induction cooktop hobs, portable batteries, air purifiers, transit passes, shared electric mobility memberships, etc.
- Conducting outreach, education and community engagement to build relationships and identify community priorities around health, transportation, air quality, etc.
- Building capacity for organizations and individuals representing low-income communities to engage around climate and resilience by providing mini-grants or stipends.

Total funding for Program Area #3 is \$100,000. Budgets must be itemized.

Eligible applicants for Program Area #3: Community Access to Resilience Measures and Electrification Engagement Pilot include community-based organizations serving income-qualified community members in Berkeley.

*Please only fill out this section if you are applying for funding under this category. Please keep responses brief and succinct.*

### 1. Organization Capacity and Readiness to Proceed Up to 23 points

A. Briefly describe what services your organization and/or project team currently provides to income-qualified people that are relevant for this project.

[Provide response here]

B. Provide a list of the proposed project staff, including name, title, and role.

[Provide response here]

### 2. Project Feasibility Up to 26 points

A. Provide a brief description of the proposed project, including other leveraged programs/funding sources, number or people served, and how funds (e.g. stipends or mini-grants) and/or electrification and resilience resources and equipment will be distributed to the community.

Attachment J, Section D –  
**ONLY** fill this out if you are  
applying for funding from this  
area

# Scoring Criteria



Criteria	Total Possible Points
Organization or Team's Capacity & Readiness to Proceed	Up to 23 points
Program Feasibility	Up to 26 points
Engaging Communities	Up to 23 points
Community Benefits	Up to 23 points
Local Vendor Preference Policy	Up to 5 points
<i>TOTAL</i>	<i>100 points</i>

# Proposed Timeline



- Written questions due: January 7, 2022
- Proposals due: January 25, 2022

	2021		2022				2023/24
	Nov	Dec	Q-1	Q-2	Q-3	Q-4	
<b>Issue Request for Proposals</b>	Issue 11/30/21		Due 1/25/22				
<b>Bidders' Conference</b>		12/13/21					
<b>Select projects</b>				City Council			
<b>Execute contracts</b>							
<b>Implement programs</b>							



# Anonymous Poll



Which category(ies) are you planning on applying to?

1: Resilient Home Retrofit Pilot

2: Electric Mobility Access Pilot

3: Community Access to Resilience Measures & Electrification Engagement Pilot

# Thank You!



- All information for this RFP, including a recording and answers to questions will be posted at: <https://www.cityofberkeley.info/RFP/> for RFP No. 22-11488-C
- Email additional questions on the RFP through January 7, 2022 to: [electric@cityofberkeley.info](mailto:electric@cityofberkeley.info)
- Deadline for proposals is **Tuesday, January 25, 2022 at 2:00 PM**





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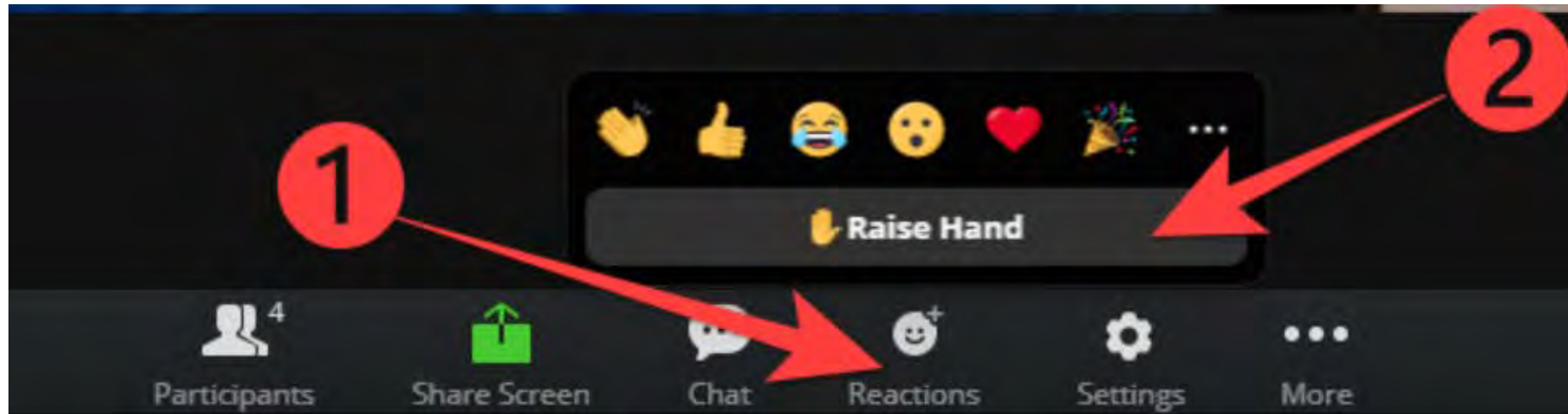
**Questions & Answers**

Closing

# Questions & Answers



- To ask a question, click the “**raise your hand**” button (in Reactions). You will be asked to unmute in the order that hands are raised.



- A recording of the webinar, and all questions and answers will be posted online at: <https://www.cityofberkeley.info/RFP/> for RFP No. 22-11488-C
- If you have additional questions after the webinar, email [electric@cityofberkeley.info](mailto:electric@cityofberkeley.info) through January 7, 2022



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