REQUEST FOR PROPOSALS TO PROVIDE

On-Site Energy Assessments & Inspections for Residential & Nonresidential Buildings Within Sierra Business Council's Northern Rural Energy Network Service Territory

September 2026

PROPOSALS DUE: ~~October 1, 2026~~ October 8, 2026 by 12:00 p.m

**SBC is extending the proposal deadline by 1 week*

Request for Proposals

I. Introduction

Sierra Business Council (SBC) is a Sierra Nevada-based nonprofit organization with a mission of advancing and demonstrating innovative approaches and solutions to increase community vitality, environmental quality, economic prosperity, and social equity in the Sierra Nevada.

SBC is one of four implementers of the Northern Rural Energy Network (NREN) program. NREN provides energy efficiency program services to PG&E, Pioneer Community Energy, Sonoma Clean Power, and Redwood Coast Energy Authority customers. SBC's NREN service territory includes the following 14 counties: Alpine, Amador, Butte, Calaveras, El Dorado, Lassen, Mariposa, Nevada, Placer, Plumas, Sierra, Sutter, Tuolumne, and Yuba.

SBC is soliciting proposals from qualified contractors and consulting firms (Respondent) to provide in-person energy assessments and post-installation equipment inspections of residential and nonresidential buildings as part of NREN's direct install programming. Buildings include, but are not limited to: single-family homes, mobile & manufactured homes, small- to medium-sized businesses, and municipal buildings throughout SBC's NREN service territory. SBC may select more than one Respondent.

The selected Respondent(s) will conduct comprehensive energy assessments of eligible buildings and inspections of installed equipment, including providing accurate data collection and detailed reports on the building's equipment conditions. SBC expects to complete an estimated 75 nonresidential install projects and 60 residential install projects in 2027. All direct install projects will require an inspection to verify proper installation. Both nonresidential and residential customers have the option to complete a facility/home energy assessment to be eligible for direct installation.

Below is a list of potential upgrades eligible under NREN direct install programming. Please note that the following upgrades are not an exhaustive list.

Non-Residential

- Heating, ventilation, and air conditioning (HVAC) equipment, specifically ducted and ductless heat pumps
- Lighting
- Floor, ceiling, and wall insulation
- Heat pump water heaters
- Refrigeration equipment
- Building controls

Residential

- Heating, ventilation, and air conditioning (HVAC) equipment, specifically ducted and ductless heat pumps
- Lighting
- Floor, ceiling, and wall insulation
- Exterior windows & doors
- Heat pump water heaters
- Laundry appliances
- Kitchen appliances

All elements of the project must be completed by **December 31, 2027**. The project requires the Respondent(s) to perform and manage all aspects of the scope of work deliverables listed below.

II. Scope of Work

The energy assessment and post-installation inspection services to be provided by the selected Respondent(s) may include, but are not limited to, the activities described below. The Respondent is expected to incorporate their own expertise into their proposed scope of work, and to propose additions/modifications to the requested scope of work that the Respondent deems necessary or advisable.

The selected Respondent(s) must coordinate and conduct on-site energy assessments of eligible residential and nonresidential buildings within SBC's NREN territory.

The Respondent(s) shall perform the following assessment tasks:

- Coordinate with SBC staff and residential and nonresidential points of contact to schedule on-site energy assessments.
- Travel to and conduct on-site energy assessments of eligible residential and nonresidential buildings to assess the technical and economic viability of energy efficiency and electrification opportunities.
- Identify and evaluate energy efficiency and electrification measures and assist with preparing assessment reports.
- Provide data collection and photo evidence of existing building equipment.
- Adhere to program requirements and utilize provided building assessment documents, software, & equipment.

The Respondent(s) shall perform the following inspection tasks:

- Coordinate with SBC staff and residential and nonresidential points of contact to schedule on-site post-installation inspections.

- Travel to project sites and conduct post-installation inspections of direct-install projects to verify that installed equipment meets program eligibility requirements and has been properly installed.
- Provide data collection and photo evidence of installed equipment.
- Adhere to program requirements and utilize provided inspection documents, software, & equipment.

III. Qualifications of the Respondent

The qualifications for the Respondent include but are not limited to experience in the following areas:

- 3+ years of demonstrated experience conducting and leading residential and/or nonresidential building onsite energy assessments and audits.
- Licenses, registrations, permits, certifications, and other authorizations required by applicable laws and regulations to perform the services.
- Experience conducting and leading ASHRAE level energy audits.
- Experience with writing building energy measure recommendations and/or technical reports.

IV. Application Requirements

To apply for consideration, please include the following in a PDF or Word document.

1. Applicant Information

a. Organization or Applicant Name:
b. Physical Office Location, if applicable:
c. Length of Time in Business:
d. Organization Website, if applicable:
e. Relevant certifications and licenses:

2. Qualifications

Please provide a narrative that includes the following information:

a. A description explaining why you or your organization are uniquely qualified to provide building energy assessment and inspection services to SBC's NREN territory and customers.

b. A description that details relevant work experience (within the past three years) with performing building energy audits or assessments and developing building energy performance analyses and reports.

c. A description that details work experience (within the past three years) with building and equipment inspections.

3. Service Region

Please identify which of the following counties within SBC's NREN territory you or your organization would intend to serve (Note: NREN only serves PG&E customers):

- ☐ Alpine
- ☐ Amador
- ☐ Butte
- ☐ Calaveras
- ☐ El Dorado
- ☐ Lassen
- ☐ Mariposa
- ☐ Nevada
- ☐ Placer
- ☐ Plumas
- ☐ Sierra
- ☐ Sutter
- ☐ Tuolumne
- ☐ Yuba

If your service territory does not fit neatly into the counties above or there is any nuance to your service region that we should be aware of, please explain.

4. References

a. Three current or former clients for whom comparable services have been performed within the last three years, with a description of the project(s) and completion date(s). Reference information should include the first and last name, name of organization if applicable, mailing address, telephone number, and email address of each referenced client's principal representative.

5. Project Fee Proposal

a. Respondents must include a complete and current schedule of proposed staff and hourly labor rates that may perform services under the resulting contract. Proposed hourly rates shall include all applicable wages, fringe benefits, payroll taxes, insurance, overhead, administrative costs, travel expenses, and profit, except for specifically identified reimbursable expenses approved in advance by SBC; overhead rates shall not be an add-on to the hourly rates proposed. Travel expenses will not be reimbursed by SBC. The cost proposal shall describe the overhead rate to be charged on material expenses, if any. Please populate the table below with all costs and fees for time billing. Make sure to use prevailing wage rates for all hourly rates.

First & Last Name	Staff Title	Loaded Rate ($/Hour)

Estimated hours spent on project scope:_____
Annual Percentage Labor Costs Increase (if applicable): _____

Description of any additional fees in addition to the prevailing wage hourly labor rates that Respondent expects may apply to these services:

_____
_____
_____

Total Budget Proposed: _____

V. Evaluation & Selection

A review committee will evaluate each submittal to determine if it meets the proposal requirements outlined in Section III. Failure to meet the requirements will be cause for eliminating the proposal from further consideration. The review committee may invite one or more Respondents to participate in interviews, presentations, or discussions as part of the evaluation process. SBC may select more than one Respondent to be awarded the contract. SBC does not guarantee any minimum number of assignments.

The review committee will be asked to score each proposal based on the following criteria:

Criteria	**Weight of Score**
Qualifications	25%
Relevant Experience	25%
NREN Territory Served	20%
Costs & Fees	30%

For full consideration, please submit your proposal as a PDF by email to Brittney Gutierrez - bgutierrez@sierrabusiness.org with the subject line: **"SBC NREN RFP Submission" by 12:00 pm on ~~October 1~~ October 8, 2026.** ***SBC is extending the deadline by 1 week.***

Questions regarding this RFP should be submitted via email to ~~bgutierrez@sierrabusiness.org~~ aherrin@sierrabusiness.org with a subject line: "**SBC NREN RFP Questions**" by ~~September~~

~~14th~~ September 30. Responses will be shared by ~~September 18th~~ October 2, posted on the SBC website, appended to this RFP, and emailed back to those who submitted questions.

VI. Additional Requirements

A. **Disclosures**: Respondent shall provide a complete and accurate disclosure of any material prior or ongoing contract failures, defaults, terminations for cause, material disputes, civil or criminal litigation, administrative proceedings, regulatory actions, or pending investigations involving the Respondent, its principals, or the Respondent's firm that are related to the performance of services similar to those contemplated under this RFP. This disclosure shall include matters occurring within the past five (5) years, as well as any current or pending matter that could reasonably be expected to affect the Respondent's ability to perform the services or its suitability for award of the contract. For each disclosed matter, the Respondent shall provide a brief description of the circumstances, the parties involved, the date, the status or disposition of the matter, and the outcome, if resolved. If the Respondent has no matters requiring disclosure under this section, the Respondent shall affirmatively state in its proposal: "The Respondent has no matters requiring disclosure under Section VI, A of the RFP." The Respondent shall promptly notify SBC of any matter requiring disclosure that arises after submission of the proposal and prior to execution of the contract. Failure to provide complete and accurate disclosures, including a failure to disclose a material matter, may result in the proposal being deemed non-responsive, disqualification from award, termination of any resulting contract, and/or other remedies available to SBC. For purposes of this section, disclosure is required regardless of whether the matter was ultimately resolved in favor of the Respondent, provided that the matter otherwise meets the disclosure requirements of this section.

B. **Insurance Requirements**: Respondent shall maintain, at its own expense, insurance meeting or exceeding the minimum requirements as follows:

- Commercial General Liability - $1,000,000 per occurrence / $2,000,000 aggregate covering property damage, products and completed operations, contractual liability, advertising injury, bodily injury, and personal injury)
- Professional Liability (Errors & Omissions) - $1,000,000 per claim / $2,000,000 aggregate
- Workers' Compensation - State of CA Statutory Limits
- Employer's Liability - $1,000,000 per accident
- Automobile Liability - $1,000,000 per accident for bodily injury and property damage, covering owned, hired, and non-owned vehicles used in connection with the services
- Cyber Liability - $1,000,000 per claim, if receiving, accessing, storing, transmitting, or otherwise handling confidential or personally identifiable customer data

All insurance carriers shall have an A.M. Best rating of A- or better and a financial size category of VII or better. Said coverage shall apply as primary and noncontributory with respect to insurance maintained by SBC. SBC and its funder shall be named as an additional insured on Respondent's Commercial General Liability and Automobile Liability policies. Respondent shall provide a Waiver of Subrogation in favor of SBC on its Commercial General Liability, Automobile Liability, and Workers' Compensation policies. Any deductible or self-insured retention in

excess of $10,000 shall be disclosed and subject to SBC's prior written approval. The Respondent shall provide certificates of insurance and required endorsements to SBC prior to or upon execution of a contract and prior to commencement of services.

C. **Debarment, Suspension, and Eligibility**: The Respondent, including its principals, officers, directors, employees, and proposed subcontractors, shall not be suspended, debarred, disqualified, or otherwise prohibited from contracting with SBC, the State of California, or any applicable governmental agency. Respondent shall disclose any current or pending suspension, debarment, disqualification, or other proceeding that could affect its eligibility to perform the services.

D. **Professional Licensing and Certifications**: Respondent shall possess and maintain all licenses, registrations, permits, certifications, and other authorizations required by applicable federal, state, and local laws and regulations to perform the services.

E. **Conflict of Interest**: Respondent shall perform all services in an objective, independent, and impartial manner and shall avoid any actual, potential, or perceived conflict of interest. Respondents shall disclose in its proposal all actual, potential, or perceived conflicts of interests involving SBC, program participants, contractors, equipment manufacturers, suppliers, vendors, or other parties associated with projects that may be assessed or inspected under the contract.

F. Site Access, Personnel, and Background/Security Requirements: Respondent shall ensure that all personnel assigned to perform services under the resulting contract are appropriately qualified, trained, and capable of performing the required services in a professional and safe manner. Because the services require personnel to enter residential and nonresidential locations, Respondent shall comply with all applicable SBC site access, identification, safety, security, and customer facility requirements. Respondent shall ensure and verify that background screenings have been conducted on all personnel who will enter occupied residential and nonresidential premises, consistent with applicable California law. Such screenings shall be completed before an individual is assigned to conduct an in-person site visit.

G. General Conditions: By submitting a Proposal, the Respondent acknowledges and agrees to the following:

1. Proposal Certification
   The Respondent represents and warrants that:
   - The proposal has been prepared independently and in good faith;
   - All information contained in the proposal is true, complete, and accurate to the best of the Respondent's knowledge;
   - The proposal has not been prepared through collusion or other agreement with any other Respondent for the purpose of obtaining an unfair competitive advantage; and
   - The Respondent has not directly or indirectly induced, solicited, or otherwise encouraged any prospective respondent to submit a sham or noncompetitive

proposal, refrain from submitting a proposal, or otherwise participate in any arrangement intended to restrict or defeat competition;

2. Improper Payments
   The Respondent represents and warrants that it has not paid, offered, promised, or agreed to pay any fee, commission, gratuity, or any other thing of value, directly or indirectly, to any employee, officer, official, representative, or existing consultant of SBC for the purpose of influencing the award of a contract resulting from this solicitation.
3. Additional Information and Clarification
   SBC reserves the right, in accordance with applicable law and its procurement policies, to request clarification or additional information from any and all Respondents for purposes of evaluating a proposal, verifying information provided, or determining the Respondent's qualification and ability to perform the services. SBC may request such information after the RFP due date. Such requests shall not permit a Respondent to materially modify its proposal or cure a material deficiency, except to the extent SBC expressly permits such modification as part of a negotiation or proposal revision process conducted in accordance with applicable law and SBC's procurement policies.
4. References and Verifications
   SBC reserves the right to contact any or all references provided by Respondent and to contact other relevant references or persons who may have information concerning the Respondent's qualifications, experience, performance, or ability to perform the services. SBC may independently verify any information provided by a Respondent, including information regarding qualifications, licenses, certifications, insurance, references, prior contract performance, and eligibility to perform the services.
5. Interviews and Presentations
   SBC reserves the right to invite any or all Respondents to participate in interviews, presentations, demonstrations, or discussions regarding their proposals. Participation in an interview or presentation does not guarantee selection or award.
6. Waiver of Minor Irregularities
   SBC reserves the right, in accordance with applicable law, to waive minor irregularities in a proposal or in the solicitation process when SBC determines that doing so is in the best interest of SBC.
7. Rejection of Proposals
   SBC reserves the right, in accordance with applicable law and its procurement policies, to reject any and all proposals; to reject any portion of a proposal, or to cancel, suspend, modify, or reissue this RFP if SBC determines that doing so is in the best interest of SBC.
8. Prior Performance and Responsibility
   SBC reserves the right to consider a Respondent's documented prior performance under contracts with SBC or other entities when determining whether the Respondent is responsible and capable of satisfactorily performing the services. SBC may reject a proposal from a Respondent that has demonstrated a documented history of material failure to properly perform or timely complete contracts of a similar nature, or that, based on information available to SBC, does not demonstrate the qualifications, experience, resources, or capability necessary to satisfactorily perform the services.

9. Multiple Awards
   SBC may select more than one Respondent to provide the services. Selection of a Respondent does not guarantee any minimum number of assignments, hours, projects, or compensation. SBC reserves the right to distribute assignments among selected Respondents in accordance with SBC's procurement policies, program requirements, geographic considerations, Respondent qualifications, availability, capacity, pricing or other factors determined appropriate by SBC.

10. Contract Award and Negotiation
    SBC reserves the right, subject to applicable law and its procurement policies, to award a contract based on the proposals received without conducting additional competition, interviews, or negotiations. SBC may, at its discretion, conduct interviews, discussions, or negotiations with one or more Respondents and may request revised proposals or other information before making an award, to the extent permitted by applicable law and SBC's procurement policies.
11. Standard Contract Terms
    The selected Respondent(s) shall be required to execute SBC's standard consultant services agreement and comply with all applicable terms and conditions contained therein. SBC reserves the right to incorporate its standard contractual language and requirements into any contract resulting from this solicitation, including requirements relating to insurance, indemnification, confidentiality, records retention, audit, compliance with applicable laws, prevailing wage, termination, and other applicable requirements.
12. Proposal Retention
    Proposals and other materials submitted in response to this RFP shall be retained by SBC in accordance with applicable law and SBC's records retention requirements and will not be returned to Respondents.
13. Authorized Signature
    Proposals must be signed by an individual who is legally authorized to bind the Respondent contractually. The signature must be accompanied by the signatory's printed name and title or position within the firm. By signing the proposal, the authorized representative certifies that he or she has authority to bind the Respondent and that the information contained in the Proposal is true and accurate. An unsigned proposal shall be rejected.

H. **Public Records and Confidential Information**: Proposals and other materials submitted in response to this RFP are subject to public disclosure pursuant to the California Public Records Act and other applicable law or legal process. Respondents should clearly identify any portions of their proposal or materials that they believe contain information that may be exempt from disclosure under applicable law. Respondents shall provide a written explanation identifying the specific information claimed to be protected and the legal basis for requested protection from public disclosure. A designation of information as confidential or proprietary by a Respondent does not, by itself, establish that the information is exempt from disclosure or prevent SBC from disclosing the information as required by law. The disclosure of proposals and other materials will be determined in accordance with applicable law. SBC makes no representation or

guarantee that information identified by a Respondent as confidential or proprietary will be withheld from disclosure. If SBC receives a request for a proposal or other materials, SBC may, but is not obligated to, notify the affected Respondent or provide the Respondent with an opportunity to assert any claimed exemption or other legal protection, to the extent permitted by applicable law. The Respondent acknowledges that SBC may be required to disclose proposals and other materials without prior notice to, or approval from, the Respondent. The Respondent shall have no right to prevent disclosure based solely on its designation of information as confidential or proprietary. SBC shall have no obligation to defend or assert on behalf of the Respondent any claim that proposals or other materials are exempt from disclosure. SBC reserves the right to incorporate its standard language into any contract resulting from this solicitation.

l. **Prevailing Wage Compliance**: The Respondent shall comply with all applicable California prevailing wage requirements for the services performed under a resulting contract. The Respondent shall be responsible for determining the appropriate prevailing wage classifications and rates applicable to its employees, subcontractors, and services and shall pay not less than the applicable prevailing wage, including required fringe benefits, for all covered work. The Respondent shall comply with all applicable prevailing wage reporting, recordkeeping, certified payroll, labor compliance, posting, notice, and other requirements.