

DOCKETED

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CALIFORNIA ENERGY COMMISSION

**Siting, Transmission and Environmental
Protection (STEP) Division
Stakeholder Roundtable
for the
Delegate Chief Building Official (DCBO)
Selection Process Update**

California Energy Commission, Sacramento, CA.

July 8, 2016



STEP

DCBO Process Update Team

- Roger E. Johnson, STEP Deputy Director (retiring)
- Michael Lewis, STEP Deputy Director (incoming)
- Christine Root, STEP Compliance Office Manager
- Rachel Grant-Kiley, Contracts and Loan Division
- Sara Kim, Staff Counsel
- Camille Remy Obad, Compliance Project Manager



DCBO Stakeholder Workshop Agenda

- Welcome, Introductions & Ground Rules
- DCBO Services Overview and the Stakeholder Roundtable Purpose & Goals
- Proposed **On-Call (OC)** and **Project Specific (PS)** DCBO Selection Processes
- Proposed Selection Process Timeline & Initial Stakeholder Feedback/Discussions
- DCBO Selection Process Update Materials, ListServer & Commenting Info



DCBO Workshop Basic Ground Rules

- Please be respectful
- Listen to understand
- It's ok to disagree, but do so with curiosity, not hostility
- To facilitate good participation under a limited timeframe please try to make your questions & comments brief & succinct
- Please put your phone on vibrate & resist the temptation to check email & multi-task



DCBO Services Overview: The Purpose and Goals of the Stakeholder Roundtable

- To explain the purpose & development of the DCBO Selection Process Update
- To begin the process of identifying issues & opportunities to improve the DCBO Selection Process
- To gather & synthesize stakeholder input to finalize the DCBO Selection Process Update



Broad Overview of Proposed Changes

- Every 2 years STEP will issue an OC DCBO Request for Qualifications (**RFQ**)
 - the STEP Evaluation Committee (Committee) selects one firm to provide DCBO services for minor amendments or O&M work requiring chief building official review/inspection.
- As needed, STEP will issue a PS DCBO RFQ after the Final Staff Assessment (FSA) or Presiding Member's Proposed Decision (PMPD)
 - the Committee will select one firm to provide PS DCBO services during continuous facility construction, modification or closure activities.



Overview of Draft On-Call & Project Specific RFQ Templates

- DCBO Proposed Tasks (1-7) & Work Performance
- Statement of Qualifications (SOQ) Requirements including:
 - administrative response forms,
 - minimum conflict of interest and qualification requirements, and
 - technical responses
- Evaluation Criteria and Selection Process



Key Elements of the Draft DCBO RFQs

For Both Templates

- Attachment 6-Exhibit H: Draft DCBO Best Management Practices (BMP) Guide
- SOQ Section 2 Minimum Requirements
- Rate Negotiations

For the OC RFQ Template

- Monthly Energy Commission Invoicing
- Disabled Veteran Business Enterprise Participation

For the PS RFQ Template

- Attachment 10: Draft 3rd Party Beneficiary Agreement



DCBO Best Management Practices (BMP) Guide (Attachment 6: Exhibit H)

- Goal of DCBO BMP Guide is to promote consistent reporting, plan review and inspection procedures
- “Living document concept” specific to each RFQ, easily adaptable to changing regulatory conditions



DRAFT DCBO RFQ Minimum Qualifications & Rate Negotiations

- Overview of DCBO Conflict of Interest Disclosure Requirements
- Goal of the DCBO Project Team Minimum Qualification Requirements
- Requirements and Use of the DCBO RFQ Rate Negotiations



Overview of Draft PS DCBO

3rd Party Beneficiary Agreement Language

- Essential Parties
- Express 3rd Party Beneficiary
- Duties of Project Owner and DCBO
- Enforcement
- Satisfactory Performance
- Amendment, Assignment & Termination
- No Liability and Flow Down Clauses



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DCBO RFQ Release [week 1]

Pre-SOQ Workshop (week 3)

Q&A Released (week 4)

Deadline for SOQ [week 6]

Admin Screening

Technical Evaluation [weeks 6 -8]

Independent Evaluations

Scoring Meetings

Discussions with Firms

Notice of Selection (NOS) [week 9]

NOS Routing

Cost Negotiations [weeks 10 & 11]

Back and forth negotiation of cost

Notice of Proposed Action (NOPA)

Agreement Drafting [week 12]

Agreement Request Package

Budget Document Finalization

Agreement Processing [weeks 12-16]

Submitted to Contracts, Grants & Loans (CGL)

Routing for Internal Approvals

Business Meeting [week 17]

Signatures [weeks 17-21]

Contractor Signatures (weeks 17-19)

Energy Commission Signature (week 20)

Contract Start (week 21)



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Initial Stakeholder Questions & Feedback?



DCBO Selection Process Update Materials, ListServer & Commenting Info

- STEP Compliance Office Website & DCBO Selection Process Update Documents & ListServer Subscriptions
<http://www.energy.ca.gov/siting/index.html>
- DCBO Selection Process Update E-Commenting Site
<https://efiling.energy.ca.gov/Ecomment/Ecomment.aspx?doCKETnumber=16-MISC-01>
- **14 Day Comment Submittal Deadline is: July 22, 2016**
- OC DCBO RFQ Release is: **To Be Determined**

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