

Exhibit to Agenda Item #3

Approve Contract Change No. 7 to Contract No. 4500116379 with **Efficiency First California** for administrative services for SMUD's Electrification Programs to extend the expiration date by three years from April 30, 2024, to April 30, 2027, and increase the contract by \$12 million with three optional one-year extensions to April 30, 2030, for \$3 million each or \$9 million in the aggregate, for a total not-to-exceed amount of \$28.8 million.

Board Finance & Audit Committee and Special SMUD Board of Directors Meeting
Tuesday, October 17, 2023, scheduled to begin at 6:00 p.m.

SMUD Headquarters Building, Auditorium

Electrification program administration Background

Current scope of work includes:

- Contractor Network administration
- Workflow automation software support

Expanded scope of work to include:

- Customer experience support
- Zero Carbon plan acceleration
- Commercial program electrification offerings
- SMUD Go Electric Marketplace
- Advanced analytics based on meter data



Electrification program administration History

Efficiency First California (EFCA) is SMUD's current contractor



Home Performance Program Launched 2008

Focus on building electrification and Zero Carbon Plan goals 2020

Expanded program to include Advanced Home Solutions and launched the Contractor Network in 2019

2022 Charge @ Home and Commercial Zero Carbon programs adopted EFCA project workflows and leveraged the Contractor Network

Future continued growth of Contractor Network to help local contractors and small business best serve our customers

Electrification program administration

Contractor and subcontractor roles



Efficiency First CA

- Program Administration
- Desktop quality review
 - Field quality control
- Trade ally management
- Contractor education & training
- Contractor support line

Subcontractor:

Recurve

Advanced analytics based on metered data

Subcontractor:

PowerClerk

- Workflow automation tool
- Contractor application system
- Project information repository
- Data reporting & analytics

SEED Subcontractors

- Field mentoring
- Field quality inspections
- Contractor education
- Admin support

Subcontractor:

Electric & Gas Industries Association (EGIA)

- Vets contractors
- Hosts contractor portal, LMS
- Hosts contractor network website

Electrification program administration

Procurement strategy

Request for qualifications (RFQ) was released in June 2023

- Held pre-bid conference for interested contractors
- 3 proposals were received

Contractors	Rank	Pass / Fail	Environmental	Experience & Qualifications	Functional Performance	Technical Performance	Company Structure	Total
Efficiency First California	1	P	10	30.3	18.8	17.0	7.3	83.4
ICF Resources, LLC	2	P	10	22.8	14.5	10.0	6.8	64.1
Resource Innovations, Inc.	3	P	4	23.0	11.1	7.0	5.0	50.1

Electrification program administration

Procurement strategy



EFCA, a nonprofit trade ally organization supporting contractors, the original partner for SMUD's Home Performance Program in 2008.



EFCA has administered the Advanced Home rebate programs for the past 15 years, instrumental with launching the Contractor Network.



EFCA is well-positioned to support SMUD contractors to best serve our customers and maintain the continuity and integrity of the rebate programs.