
Appendix H

Request for Information and Request for Proposal

REQUEST FOR INFORMATION (RFI)

RFI 22-13MB:

Zero Emission Infrastructure for Heavy-Duty Trucks Serving Port of San Diego and the San Diego Region



Procurement Services

***San Diego Unified Port District
1400 Tidelands Avenue
National City, CA 91950***

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ALL INQUIRIES REGARDING THIS RFI SHALL BE DIRECTED TO:

Mike Bautista, Procurement Analyst II

Phone: (619) 725-6061

mbautista@portofsandiego.org

KEY RFI DATES

Issued: May 23, 2022

Submit Questions By: July 11, 2022, 12:00 PM

Submittals Due By: July 25, 2022, 2:00 PM

(All Times Listed are Pacific Time Zone)

REQUEST FOR INFORMATION (RFI)

RFI 22-13MB: Zero Emission Infrastructure for Heavy-Duty Trucks Serving Port of San Diego and the San Diego Region

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Zero Emission Infrastructure for Heavy-Duty Trucks Serving Port of San Diego and the San Diego Region

I. INTRODUCTION

A. General Background

1. The San Diego Unified Port District (commonly referred to as the "District") is a public benefit corporation established in 1962 by an act of the California State legislature and ratified by the voters of the five member cities of the District. The enabling legislation and subsequent amendments conveyed certain tide and submerged lands within San Diego Bay and the oceanfront within the City of Imperial Beach to a District administration to further the development of commerce, navigation, fisheries and recreation on behalf of the state of California, which owns these lands. The lands are conveyed to the District as a trustee of the state.
2. The District's five member cities are Chula Vista, Coronado, Imperial Beach, National City and San Diego. The District's jurisdiction covers waterfront property within these cities and approximately 2,500 acres of land and 3,400 acres of water (commonly referred to as "District Tidelands").
3. Additional information about the District can be found by visiting its web site at <http://www.portofsandiego.org>

B. Overview of Request for Information (RFI)

This RFI seeks information to facilitate the District's deployment of infrastructure to support the transition to zero-emission (ZE) truck trips to and from the District's marine cargo terminals in San Diego and National City (Tenth Avenue Marine Terminal and National City Marine Terminal, respectively). The District's objective is to identify opportunities to deploy public-facing infrastructure for both battery electric and hydrogen fuel cell ZE technologies for Heavy Duty (HD) trucks. For this RFI the District has identified four (4) potential sites on District Tidelands. The District is also interested in opportunities on property not controlled by the District located throughout San Diego County along high volume freight corridors (indicated as "Regional Locations" in this RFI). These areas include, but are not limited to, areas adjacent to District Tidelands, Otay Mesa, and along the Interstates (I)-5, I-8, and I-15.

The District recognizes that the ZE truck industry is undergoing fast-paced changes with new participants and business alliances. The District will use the information provided through this RFI to better understand the current state of the industry, including but not limited to interest levels, technologies, costs, business cases, and schedule requirements unique to installing and operating infrastructure to support the deployment of ZE HD trucks serving the District's marine cargo terminals. The information will help guide the development of public ZE infrastructure facilities both on District property and regionally, to serve the District's marine cargo terminals prior to June 30, 2026.

Based on information submitted in response to this RFI, the District may issue a Request for Proposals (RFP) or the District may, at its discretion, select one or more RFI respondents and enter into discussions and/or negotiations, and may enter into agreements as a result of the RFI.



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The District seeks the submittal of Information Packages from:

- (1) vendors and suppliers of battery electric and hydrogen fuel cell ZE infrastructure;
- (2) property owners interested in working with the District and others to build a network of hydrogen fuel cell and/or battery electric ZE truck infrastructure network on their property; and
- (3) entities interested in leasing, developing, and maintaining a site, as well as supplying, installing, and operating equipment, that will be part of the ZE HD truck infrastructure network that will serve the District's marine terminals and greater San Diego County.

The District is looking to gather the below information for the four ZE HD truck infrastructure sites that have been preliminarily identified as good candidates (for both battery electric and hydrogen fuel cell) on District Tidelands and Regional Locations:

- (1) Design concepts;
- (2) Business models and operational plans;
- (3) Technical barriers;
- (4) High-level costs; and
- (5) Proposed role of the District in such opportunities.

Respondents must submit their information packages no later than July 25, 2022, 2:00 PM. Packages must be submitted through the District's PlanetBids vendor portal. Information Package preparation guidelines and submittal instructions are discussed in Sections II and III, as well as procedures for submitting questions should you need additional information or clarification.

C. Maritime Clean Air Strategy – Purpose

Through this RFI, the District seeks to identify business entities interested in working with the District to implement the ZE truck goals and objectives identified within the Maritime Clean Air Strategy (MCAS). The MCAS is a strategic planning document the District's Board of Port Commissioners (Board) adopted in October 2021 to identify future projects and initiatives to reduce emissions while also supporting efficient and modern maritime operations within the District Tidelands.

The goals and objectives relevant to this RFI are aimed at transitioning to ZE trucks, including:

- 100% ZE trucks serving the District's marine cargo terminals by 2030
- 40% of truck trips serving the District's marine cargo terminals will be ZE by June 30, 2026
- Facilitate the deployment of infrastructure to support the transition to ZE truck trips to the District's marine cargo terminals
- Within the fourth quarter of calendar year 2022, present a concept plan to the District's Board for its consideration that identifies four (4) potential public-facing HD truck charging locations within the San Diego Region to



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support deployment of ZE trucks, which may include locations in close proximity to or on the District's marine cargo terminals.

The District has conducted significant stakeholder outreach to help identify potential sites and areas on District Tidelands and in the San Diego Region. In addition, the District is completing the Truck Transition Plan to help identify the needs to achieve ZE trucking serving the District. For more information about the MCAS and the Truck Transition Plan, please visit the District's website at www.portofsandiego.org/MCAS.

D. Objectives

This RFI is intended to obtain information regarding the near-term development of publicly accessible ZE HD infrastructure (hydrogen fuel cell and/or battery electric) to support the transition of truck trips to ZE from the District's marine cargo terminals.

Definitions for the purposes of this RFI:

- "near-term" is defined as a facility that is fully operational prior to June 30, 2026.
- "publicly accessible" is a facility where truck fueling and/or charging are available at least part of the day for public access to the facility.

The RFI seeks to further understand the following issues related to publicly accessible HD electric charging and/or hydrogen fueling:

1. **Development Interest:** Identify third-party developers to construct and/or operate publicly accessible ZE HD truck infrastructure located on District Tidelands and Regional Locations throughout San Diego County no later than June 2026;
2. **Business Models:** Identify potential business models to deploy infrastructure, including, but not limited to, charging as a service / subscription-based models;
3. **District Support:** Role of the District to support the successful deployment of ZE HD infrastructure, including direct or indirect, financial or non-financial needs, need for public subsidy, etc., if applicable;
4. **Siting Preferences:** District Tidelands' site and Regional Location preferences identified in Section I.E (i.e., which sites and/or Regional Locations are most attractive to third-party developers);
5. **Configuration Potential:** Number of hydrogen fuel cell fueling stations and/or electric charging units that can be developed per site and potential configurations to maximize available land area;
6. **Capacity:** Projected dispensing capacity of hydrogen fueling stations (in kilograms) and/or total electricity capacity requirements for electric charging units (in kilowatts);
7. **Costs and Timelines:** Estimated construction costs and reasonable timeframes to deploy sites hosting ZE HD truck infrastructure;
8. **Term of Agreements:** Length of contract term proposed for site;
9. **Barriers:** Barriers and challenges to developing publicly accessible hydrogen fueling or charging for HD trucks at the District and/or Regional Locations, including financial, regulatory, permitting, operational, technological issues, and/or safety considerations; and



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10. **Risks:** Any near- or long-term risks to the District associated with such a development.

Based on information submitted in response to this RFI, the District may issue a Request for Proposals (RFP) or the District may, at its discretion, select one or more RFI respondents and enter into discussions and/or negotiations, and may enter into agreements as a result of the RFI.

E. Proposed Sites and Regional Locations

This RFI solicits opportunities for the development of public-facing infrastructure for both battery electric and hydrogen fuel cell ZE technologies to support HD trucks. This RFI includes four (4) sites located on District Tideland and four (4) Regional Locations throughout San Diego County along routes frequented by trucks traveling to and from the District's marine cargo terminals.

Respondents may provide information about any or all of the sites identified in this RFI. There is no requirement to provide development concepts for all sites and Regional Locations. Respondents submitting information for more than one site are encouraged to rank the sites in order of preference for future development. Respondents may propose concepts that develop only a portion of a site.

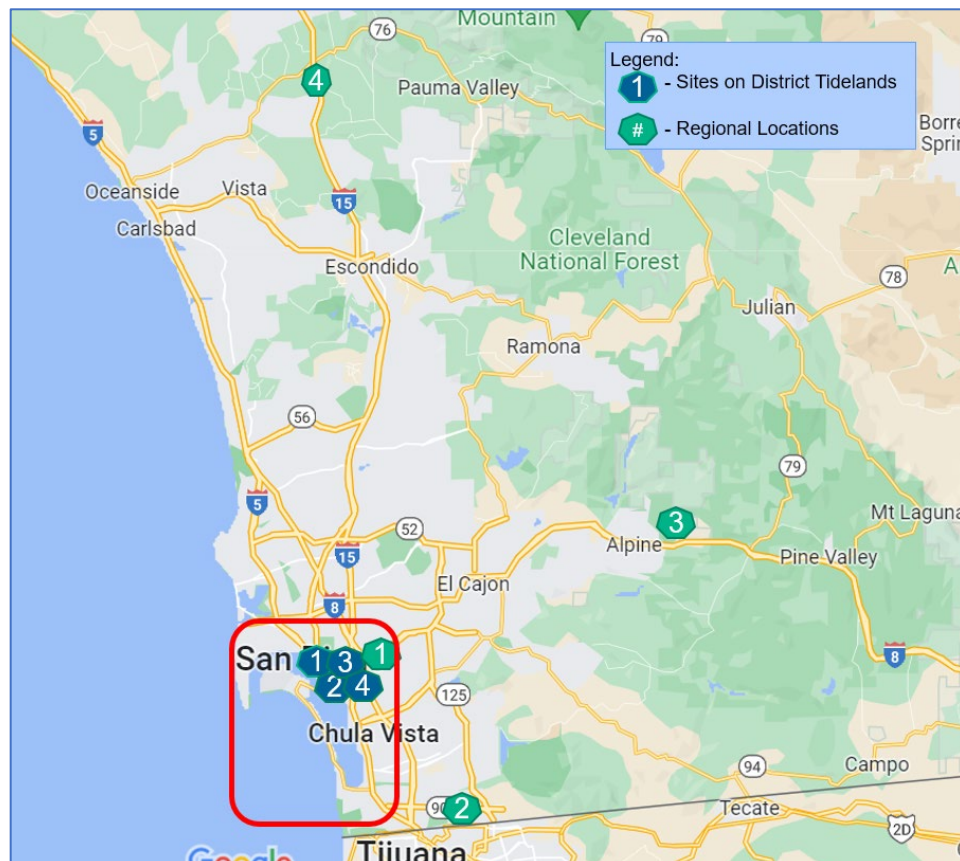


Exhibit A: Proposed Sites and Regional Locations



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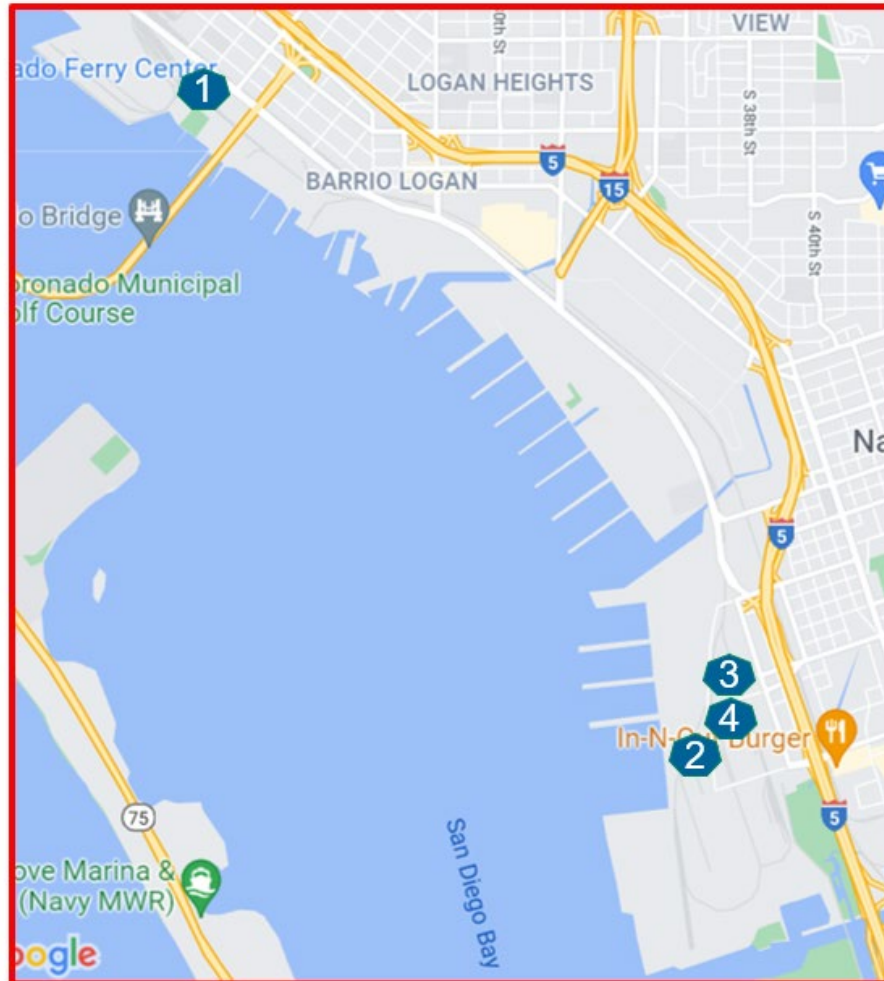


Exhibit B: Proposed Sites on District Tidelands

District Tidelands Site 1: Dirt Lot at TAMT (San Diego)

This site is owned by the District and located at the entrance to Tenth Avenue Marine Terminal (TAMT) at the intersection of Crosby Road and Water Street in the city of San Diego. It is vacant, unpaved as its name suggests, and offers approximately one (1) acre of available space. The site is owned by the District and currently unused. (Accessor Parcel No. (APN) 760-020-18)



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Exhibit C: District Tideland Site 1, Dirt Lot at TAMT

District Tideland Site 2: Pepper Oil (National City)

This 2.75-acre paved site is owned by the District and located near the National City Marine Terminal (NCMT) at the intersection of Bay Marina Drive and Tideland Avenue in National City. The site is currently leased to a tenant via a month-to-month agreement, but the site may be made available to other interested parties for opportunities being solicited in this RFI. The site will need environmental remediation analysis prior to construction. (APN 760-044-16)

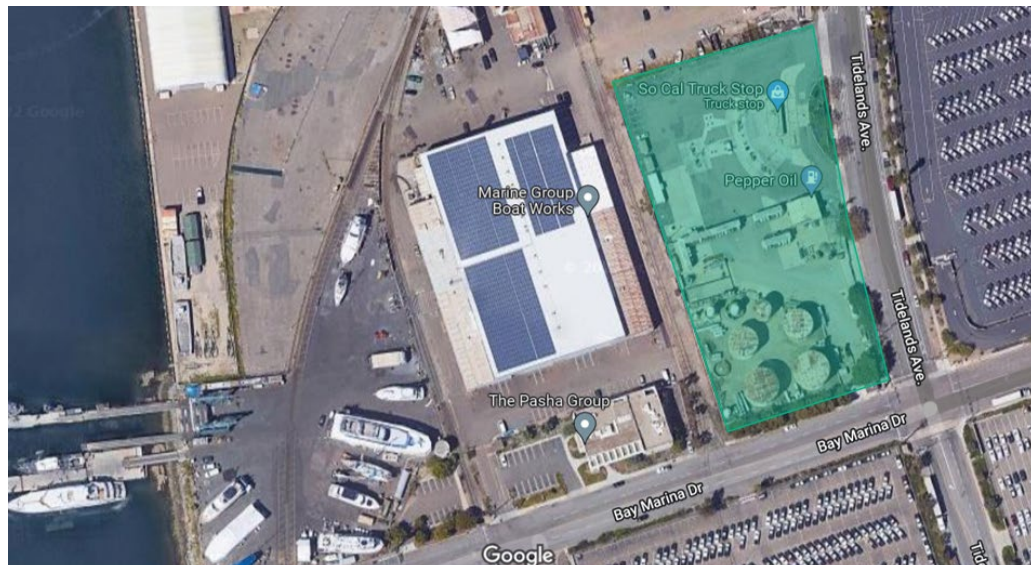


Exhibit D: District Tideland Site 2, Pepper Oil



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District Tidelands Site 3: Parcel located northwest of the 19th Street/Tidelands Avenue Intersection (National City)

This 8.2-acre paved site is owned by the District and located northwest of the intersection of 19th Street and Tidelands Avenue in National City. The site is currently leased to a tenant via a month-to-month agreement, but the site may be made available to other interested parties for opportunities being solicited in this RFI.

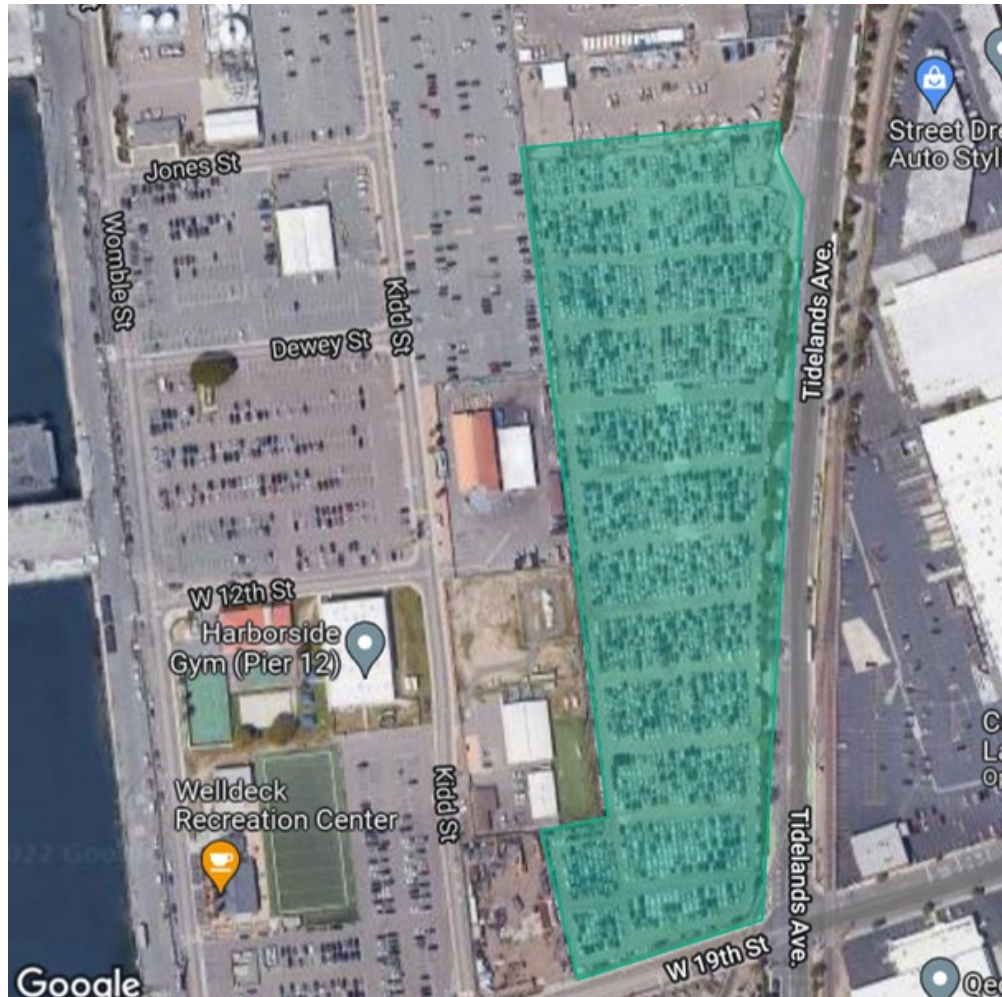


Exhibit E: District Tidelands Site 3, Parcel NW of 19th Street/Tidelands Avenue Intersection

District Tidelands Site 4: Parcel located southwest of the 19th Street/Tidelands Avenue Intersection (National City)

This site is located southwest of the intersection of 19th Street and Tidelands Avenue in National City. The roughly 5-acre site is comprised of two separate parcels, both owned by the District. The site is currently leased to a tenant via a month-to-month agreement, but the site may be made available to other interested parties for opportunities being solicited in this RFI. The north parcel of the site is gravel, and the south parcel of the site is paved. (APNs 760-044-43 and 760-044-45)



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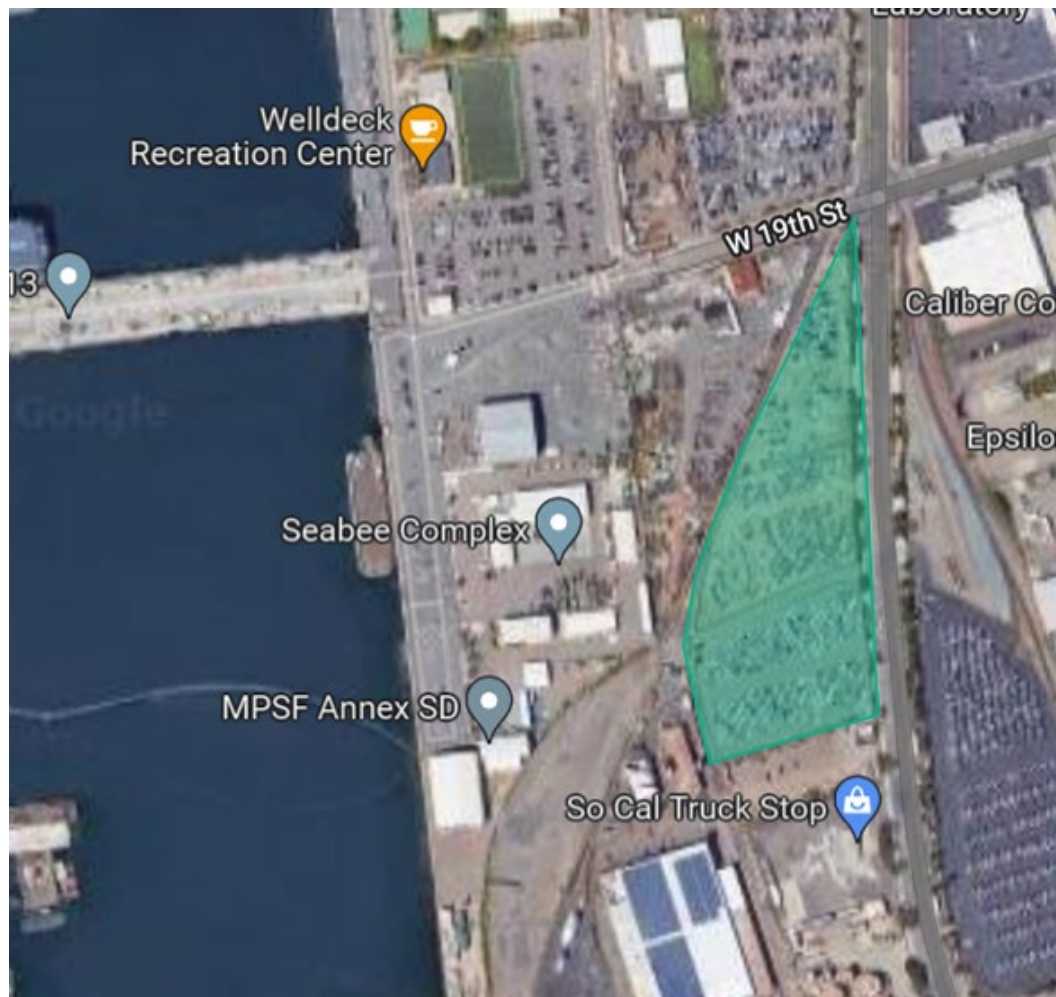


Exhibit F: District Tidlands Site 4, Parcels SW of 19th Street/Tidlands Avenue Intersection

Regional Locations throughout San Diego County

The below referenced Regional Locations have been preliminarily identified. The District invites concepts through this RFI for other strategic sites within San Diego County.

Regional Location 1: District Tidlands Adjacent, San Diego County

The District is interested in working with property owners within five (5) miles of the working waterfront section of Tidlands, from East Village to the North down to Sweetwater River, National City at the South end.

Regional Location 2: Otay Mesa, San Diego County

The District is interested in working with property owners in the Otay Mesa region of San Diego County.



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a) *Caltrans Otay Mesa Site:*

Through collaboration with Caltrans, the District and Caltrans have identified a Caltrans property located adjacent to the Otay Mesa Border Crossing that is ripe for ZE Truck infrastructure development. The District is interested in this site, along with others at this Regional Location.



Exhibit G: Caltrans Otay Mesa Site

b) *Pasha Automotive Otay Mesa Site:*

Additionally, through collaboration with Pasha Automotive, the District and Pasha Automotive have identified an approximately 5-acre section of an approximately 40-acre site, currently under long-term lease to Pasha Automotive from de la Fuente Enterprises, that could be subleased for ZE truck infrastructure development. Presently, the surface of the site is gravel. The District is interested in this site, along with others at this Regional Location.



Exhibit H: Pasha Automotive Otay Mesa Site



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Regional Location 3: I-8 Corridor, San Diego County

The District is interested in working with property owners along the Interstate 8 corridor in San Diego County.

Regional Location 4: I-15 Corridor, San Diego County

The District is interested in working with property owners along the Interstate 15 corridor in San Diego County.

a) *Caltrans I-15 Corridor Site*

Through collaboration with Caltrans, the District and Caltrans identified a second site on Caltrans Property located at the Northwest intersection of the I-15 and I-76 Park and Ride at Pala Mesa. This site is ripe for ZE HD truck infrastructure development and may already have all below ground infrastructure installed to support EV HD trucks.



Exhibit I: Caltrans I-15 Corridor Site

Non-Interest in Identified Sites on Tidelands and/or identified Strategic Locations

Respondents that are interested in developing public-facing ZE HD Truck infrastructure, but do not see the feasibility in any of the sites identified in this RFI, are encouraged to submit information to that effect. Please clearly state why these sites are not desirable and/or other sites and Regional Locations we should consider. Such information will inform the District's future decisions around ZE HD truck infrastructure development and site selection.



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F. Permitting

If any proposed development activity, within the District, were to move forward, an application for a Coastal Development Permit (CDP) for the proposed improvements must be submitted to the District, in accordance with requirements of the California Coastal Act of 1976 and the San Diego Unified Port Act. Additional types of permits may also be necessary.

G. Environmental Requirements

Under the California Environmental Quality Act (CEQA), an activity that may cause either a direct physical change in the environment or a reasonably foreseeable indirect physical change in the environment is a "project". For development with the District on Tidelands, the issuance of a CDP constitutes a discretionary approval by the District, and as the Lead Agency, requires compliance with CEQA. CEQA requires public agencies, such as the District, to identify potential significant environmental impacts of proposed projects and to avoid or mitigate them, if feasible. District compliance with CEQA may include preparation of a Notice of Exemption or conducting an Initial Study and preparing a Negative Declaration, a Mitigated Negative Declaration, or, if there are potentially significant impacts, and Environmental Impact Report.

CDP filing fees and costs associated with the preparation of either a Negative Declaration, Mitigated Negative Declaration, or Environmental Impact Report, if required, would be the responsibility of the project applicant. The costs for preparation of the environmental review document are based on estimates of consultant and District staff time, depending on the overall scope and complexity of the proposed project. These costs do not include the costs/fees for other permits and entitlements that may be required by other agencies. Please note that if another public agency, other than the District, is the CEQA lead agency, the environmental review process above may differ.

H. Limitations

No submittals, including without limitation information contained in this RFI, received by interested parties, or any potential letter of intent (LOI), shall commit the District to approve a proposal; approve or enter into a letter of intent or similar non-binding proposal; approve or enter into a lease; assign, reserve, or commit any site to any party; or enter into any other course of action. The District retains all rights with respect to this RFI, any LOI, any lease, and all other matters and contracts concerning the sites. The District retains the sole discretion to reject a submittal at any time without explanation or cause and/or discontinue negotiations at any time, and may make any such decision without completing a CEQA determination.

Additionally, the District, as part of its normal business development process, may entertain development concepts outside of this RFI process for the sites in question, or other sites not identified in this RFI.



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II. INFORMATION REQUIREMENTS

A. Content

The following items shall be included in your submittal:

1. Cover Transmittal Letter

Provide a narrative that introduces the firm and team, highlighting the special strengths of the firm to execute the proposed development concept. Please include an acknowledgment that the Respondent has received and reviewed the RFI and all addenda. The letter should be signed by an authorized representative of the submitting entity.

2. Qualifications, Experience, and References

Provide a narrative describing the entity's qualifications and at least two (2) client references with contact names and information. Include information regarding your entity's financial capacity and experience involving similar developments. Describe your entity's experience working with utilities on similar projects. If the entity's business plan includes grant funds, please describe your experience with grant programs and requirements, including past experience securing and managing such funds. Additionally, please describe your policies and programs regarding diversity, equity, and inclusion, as well as your company's approach to diversity in subcontracting. Qualifications and experience for proposed sub-consultants must also be included.

3. Description of Organization, Personnel, and Staffing

Provide a brief description of all key personnel (including vendors, partners, or sub-consultants) to be involved and their relationship to the services provided.

- Include names, titles, fields of expertise, and relevant experience.
- Identify the key manager(s) for the development concept.

4. Business Model and Financial Projections

Provide a description of your business model (i.e., charging as a service) including proposed revenue-generating mechanisms and cost-recovery strategies. Indicate any assistance anticipated from the District, including direct or indirect non-monetary assistance and in-kind or direct financial assistance, if applicable. If your business plan relies on grant funding, describe plans for securing such funds. Qualitatively, describe the resources and actions needed to ensure the long-term viability of the ZE HD Truck Infrastructure facility.

Please also indicate how your business may leverage grants, subsidies or District-supplied real property, services, or utilities that are assumed in your submittal. If your budget assumes direct financial or in-kind assistance from the District, please be specific, indicating the projected amount and length of time for such assistance.



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5. Proposed Development Concept – Overview of Operational Model

Provide an overview of your entity's operational model, addressing the following topics:

- a. *Business model:* Describe your entity's conceptual business model to develop and operate ZE infrastructure site(s), e.g., charging as a service.
- b. *Customer service model:* Describe your entity's customer service model, e.g., payment processing, reservation scheduling, etc.
- c. *Data collection:* If applicable, describe any operational data that could be collected (e.g., volume of customers and time/duration of use) and shared with the District to facilitate tracking towards achieving MCAS objectives, emissions reductions, etc.
- d. *Barriers:* Identify any barriers and challenges to developing publicly accessible EV charging and/or hydrogen fueling for HD trucks at the District and/or Regional Locations, including, but not limited to, financial, regulatory, permitting, operational, technological issues, and/or safety considerations.
- e. *Risks:* Any near- or long-term risks to the District associated with such a development.

6. Site Design Concepts

Provide a description of the proposed development concept for each District Tideland site and/or site located within/near a Regional Location of interest. There is no requirement to submit interest for all District Tideland sites and/or Regional Locations, nor is there a requirement to propose development for the entire site acreage.

- a. *Conceptual design, capacity and configuration potential:* Describe a conceptual site design, indicating how the proposed site can be maximized, including the square footage required, number of EV charging stalls and/or hydrogen fueling units, and how the site will support overnight and opportunity charging if applicable. Identify proposed EV charging capacities (i.e., kilowatt capacity), connector type(s), and certifications (i.e., UL-listed); if proposing hydrogen fueling stations, please indicate the dispensing capacity of the site, if applicable.
- a. *Estimated costs:* To the extent feasible, please provide an estimated cost for the ZE Truck Infrastructure concept. The District is interested in estimated costs associated with the design and construction of a publicly accessible ZE Truck Infrastructure facility, whether it be EV charging facilities, hydrogen fueling facilities, or a combination thereof. Please list the assumptions used to derive the estimated capital costs. The District understands that these are preliminary costs and subject to change.
- b. *Estimated development schedule:* Provide a high-level estimated development schedule, including the timeframe for site design, permitting, construction, and commissioning.



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- c. *Distributed energy resources, energy management, and energy storage:* If applicable, describe any distributed energy resources and energy management strategies that could be incorporated into the site to reduce energy costs and improve energy load management.

Provide a description of your business model (e.g., charging as a service), including proposed revenue-generating mechanisms and cost-recovery strategies. Indicate any assistance anticipated from the District, including direct or indirect non-monetary assistance and in-kind or direct financial assistance, if applicable. If your business plan relies on grant funding, describe the firm's plan for securing such funds. Qualitatively, describe the resources and actions needed to ensure the long-term viability of the ZE HD Truck Infrastructure facility.

Describe how the development and proposed use will meet the MCAS goals and objectives identified in Section I.C. Identify any barriers – financial, regulatory, technical, etc. – that could preclude your firm's ability to achieve these goals and describe ways to overcome them.

III. INSTRUCTIONS TO RESPONDENTS

- A. Questions. Questions or comments regarding this RFI must be submitted electronically to PlanetBids eBid system, where the RFI was downloaded, and must be received by District no later than July 11, 2022, at 12:00 PM. All electronic questions must be received by the date stated above. Responses from District will be communicated via the electronic PlanetBids system to all recipients of this RFI. Inquiries received after the date and time stated above will not be accepted.
- B. Addenda. If changes to the RFI are required, the District will issue an addendum to all Respondents via PlanetBids. All Respondents will receive an email notifying them that an addendum has been issued. All addenda, if any, must be acknowledged via PlanetBids.
- C. Information Package Preparation Checklist
The following are suggested components of an Information Package response to this RFI. The District understands that not all respondents will be able to provide all requested information and that some information will be withheld due to confidentiality concerns. The District appreciates any and all information that can be shared regarding your firm's interests and capabilities in developing ZE HD Truck Infrastructure.
- ☐ Cover Transmittal Letter
 - ☐ Qualifications, Experience, and References
 - ☐ Description of Organization, Personnel, and Staffing
 - ☐ Business Plan and Financial Projections
 - ☐ Proposed Development Concept – Overview of Operational Model



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Zero Emission Infrastructure for Heavy-Duty Trucks Serving Port of San Diego and the San Diego Region

- ☐ Site Design Concepts
- ☐ Optional Materials: Brochures, Design Drawings, Marketing Information

D. Information Package Submittal Instructions

1. **All Respondents are required to submit their information electronically via the electronic PlanetBids system with which they downloaded this RFI.** The maximum file size for submittal submission is 150 megabytes, and the file type shall be Portable Document Format (PDF). The electronic system will close submission exactly at the date and time set forth in this RFI or as changed by addenda. An electronic copy of the firm's submittal must be attached to the electronic system.
2. Respondents are responsible for submitting and having their information accepted before the closing time set forth in this RFI or as changed by addenda. NOTE: Pushing the submit button on the electronic system may not be instantaneous; it may take time for the Respondent's documents to upload and transmit before the submittal is accepted. It is the Respondent's sole responsibility to ensure their document(s) are uploaded, transmitted, and arrive in time electronically. The District will have no responsibility for submittals that do not arrive in a timely manner, no matter what the reason.

E. Corporate Information and References

The District also requests the following information from respondents:

1. Briefly describe your company, products, services, history, ownership and any other relevant information. In particular, describe any projects with which you have been involved that are similar in concept to what is described in this RFI, including management and operations approach, methodologies, work effort and any relevant lessons learned.

E. Rights of District

1. Based on information submitted in response to this RFI, the District may issue a Request for Proposals (RFP) or the District may, at its discretion, select one or more RFI respondents and enter into discussions and/or negotiations, and may enter into agreements as a result of the RFI. This RFI does not commit the District to enter into an Agreement, nor does it obligate the District to pay for any costs incurred in preparation and submission of this RFI or in anticipation of an Agreement. The District reserves the right to accept, reject or use without obligation or compensation any information submitted in response to the RFI.

- F. Withdrawal of Submittals. A Respondent may withdraw their submittal before the expiration of the time for submittals by going to PlanetBids and removing their submission.

REQUEST FOR PROPOSALS (RFP)

RFP 23-12MB: ZERO EMISSION TRUCK STOP, NATIONAL CITY



Procurement Services

***San Diego Unified Port District
1400 Tidelands Avenue
National City, CA 91950***

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RFP POINT OF CONTACT:
Michael Bautista, Procurement Analyst
mbautista@portofsandiego.org

KEY RFP DATES

Issued:	April 24, 2023
Information Exchange Meeting:	May 10, 2023 at 11:00 AM PT
Information Exchange Site Visit:	May 16, 2023 at 10:00 AM PT
Submit Questions By:	June 2, 2023 at 2:00 PM PT
Proposals Due By:	June 27, 2023 at 2:00 PM PT
Tentative Oral Interviews:	August 15, 16, 2023
Board Award of Agreement:	November 14, 2023 at 1:00 PM PT
Tentative Project Start Date:	January 2024

(All Times Listed are Pacific Time Zone)

REQUEST FOR PROPOSALS (RFP)

RFP 23-12MB: ZERO EMISSION TRUCK STOP, NATIONAL CITY

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EXHIBIT :

Exhibit A – Map of Parcels	Posted on eBid System under Documents Tab
Exhibit B – Lease Template	To be provided at a later date



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I. INTRODUCTION

A. District Background

1. The San Diego Unified Port District (commonly referred to as the District) is a public corporation established in 1962 by an act of the California State legislature and ratified by the voters of the five member cities of the District. The enabling legislation and subsequent amendments conveyed certain tide and submerged lands within San Diego Bay and the oceanfront within the City of Imperial Beach to a District administration to further the development of commerce, navigation, fisheries and recreation on behalf of the state of California, which owns these lands. The lands are conveyed to the District as a trustee of the state.
2. The District's five member cities are Chula Vista, Coronado, Imperial Beach, National City and San Diego. The District's jurisdiction covers waterfront property within these cities and approximately 2,500 acres of land and 11,800 acres of water (Tidelands).
3. Additional information about the District can be found by visiting its web site at <http://www.portofsandiego.org>.

B. Maritime Clean Air Strategy (MCAS) Purpose

The Maritime Clean Air Strategy (MCAS) is a strategic planning document that was adopted by the Board of Port Commissioners (Board) on October 12, 2021, to identify future projects and initiatives to reduce maritime related emissions while also supporting efficient and modern maritime operations within District Tidelands. The MCAS includes a vision of "Health Equity for All" and contains 38 near-term objectives to advance emission reduction and community enrichment along the District's Working Waterfront, including ambitious goals and objectives that focus on reducing emissions related to the serving the District's marine cargo terminals. For more information about the MCAS, please visit the District's website at www.portofsandiego.org/MCAS.

C. MCAS Truck Goals & Objectives, and Request for Information (RFI)

The MCAS includes an aspirational goal that 40 percent of heavy-duty (HD) trucks calling the District's marine cargo terminals will be zero-emission (ZE) by June 30, 2026, and 100 percent by December 31, 2030. Infrastructure to power these battery electric vehicle (BEV) HD ZE trucks (BEV trucks) is critical to achieving these aspirations. MCAS Truck Goal 2 facilitates the deployment of infrastructure to support the transition to ZE trucks. More specifically, Truck Objective 2A directed staff to present a concept plan to the Board that identified four potential infrastructure sites within the region to support the deployment of ZE HD trucks.



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In summer 2022, as the first step to implement Truck Goal 2 and Truck Objective 2A, the District released a Request for Information (RFI) solicitation for ZE Infrastructure for HD trucks serving the District and the region in order to learn more about the emerging technologies and the associated business models, as well as the appropriate site concepts, and features the District should consider in the development of future ZE truck infrastructure sites. The RFI was open from May 23, 2022 to July 25, 2022 and identified four sites located on District Tidelands, along routes frequented by trucks traveling to and from the District's marine cargo terminals, the Tenth Avenue Marine Terminal (TAMT) in San Diego and the National City Marine Terminal (NCMT) located in National City that could potentially be developed as infrastructure sites.

After reviewing the 18 responses received, staff determined that collectively there were several promising site concepts and business models, and not one response alone met the needs of the District. Therefore, a Request for Proposals (RFP) was identified as the next step in the process to develop the infrastructure needed to support ZE HD trucks on Tidelands. On November 8, 2022, Board of Port Commissioners approved moving forward with an RFP to develop infrastructure to support ZE HD trucks on Tidelands at the intersection of 19th Street and Tidelands Avenue in National City (Agenda Item No. 2022-0329). The aim of this RFP is to identify and select an entity to develop, operate, and maintain the proposed ZE HD truck infrastructure site to support BEV trucks.

The RFI was technology agnostic with no preference given to BEV or hydrogen fuel cell (HFC) technologies. At this time, the District has decided to focus exclusively on BEV technology for this RFP. As other technologies such as HFC become more viable and use increases, the District will explore its implementation under future solicitations. This will allow the market and state of emerging technologies to better align prior to investing capital in concepts that may soon be obsolete.

II. SCOPE OF SERVICES

A. Summary

This RFP seeks proposals from entities interested in and capable of designing, building, operating, and maintaining a ZE Truck Stop that deploys infrastructure to charge BEV trucks. The proposed site is located on Tidelands at the intersection of 19th Street and Tidelands Avenue in National City (Exhibit A – Map of Parcels). The proposed ZE Truck Stop site will be publicly facing while prioritizing trucks that serve the District's marine cargo terminals, the TAMT in San Diego and the NCMT located in National City.

The District's objective is to deploy BEV infrastructure technology with a phased approach that considers the available land area, inventory of charging needs and associated infrastructure at the ZE Truck Stop, which is cognizant of increasing demand overtime.



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Preferred concepts include:

- Proposed lease term not to exceed twenty (20) years;
- Development of infrastructure to occur under lease term;
- Prioritization of District trucking needs, however publicly available in some capacity (e.g., designated times and/or charging stalls);
- Proposed rent structure to include revenue share to the District;
- Financially feasible proposal;
- Demonstrated experience;
- Plan to scale up business as demand grows;
- Integration of distributed energy resources (e.g., solar photovoltaics, energy management strategies, battery energy storage, microgrid, etc.); and
- Utilize “forward looking planning” to ensure the technology and standards used for this project are either compatible or upgraded with assets that are widely adopted as the BEV sector matures.

The District is seeking a comprehensive development and operation plan that will provide the highest quality ZE Truck Stop with the best available technology. The proposal may include a mix of uses to activate the site and enhance the overall economic viability of the project (e.g., restaurant and/or convenience store). The District seeks to engage a team or team(s) with demonstrated capabilities, experience and success entitling, designing, building, financing, operating, and maintaining ZE infrastructure facilities.

B. Site Description

The proposed site may include either one, two, or all three parcel(s) identified in Exhibit A located at the intersection of 19th Street and Tidelands Avenue in National City to design, construct, operate, and maintain a ZE Truck Stop to support BEV trucks that call to the District’s marine cargo terminals, and other regional partners. The site is located approximately 3.5 miles south of TAMT and approximately half mile north of NCMT.

- **Parcel 1:** Located at the northwest corner of the intersection is approximately 8.2 acres
- **Parcel 2:** Located directly southwest of the intersection and is approximately 2.8 acres
- **Parcel 3:** Located directly south of Parcel 2 and is approximately 2.0 acres

There is an access easement that runs between Parcel 2 and Parcel 3 that must be maintained in site design with no development located within the easement. However, this does **not** prevent the two parcels from being connected or preclude access or use, it just must remain unincumbered by development. The Proposal may identify an initial phase that includes the ZE Truck Stop on a portion of one of the three parcels with plans to scale up to an entire parcel, or multiple parcels, as a part of a phased approach aligned with increases in demand for BEV infrastructure to charge BEV trucks.



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C. Specifications

The ZE Truck Stop shall be available for charging 24 hours of the day, 7 days of the week (24/7) along with the following Specifications:

1. Business Models

The District seeks a tenant for a long-term lease under a hybrid public private partnership (PPP) business model. Under this model, the District would lease the site to a Proposer that would carry forward the vision articulated in their proposal for design, entitlements, construction, operation, monitoring, and maintenance that is in line with the parameters set forth in this solicitation. The selected Proposer would assume investment, revenue, and development risk, while offering the District some share of the project's gross revenue. The District may provide support for satisfying the entitlement process (including, but not limited to California Environmental Quality Act (CEQA) and permits from the District and City of National City), flexibility on lease terms and associated rent structure that includes revenue share, public grant funding, and other subsidy programs (e.g., Low Carbon Fuel Standard (LCFS)).

The District prefers the following business model attributes:

- Strategies to self-fund or finance the capital investment needed without reliance on District funding;
- Proposer will design, construct, own, operate, and maintain the charging infrastructure and provide power on a per kilowatt hour (kWh);
- Proposed rent structure including revenue share to the District;
- Public availability with priority granted to District trucking needs;
- Phased approach that considers plans to scale up business as demand grows. ("Scaling up" includes providing electric vehicle supply equipment (EVSE), or "chargers", for both opportunity and overnight charging);
- Integration of distributed energy resources (e.g., solar photovoltaics, energy management, battery energy storage, microgrid, etc.);
- Plan to maximize benefits from demand management and time-of-use pricing;
- Accessible payment method that provides contactless payment accepting major credit and debit cards, and automated toll-free phone number or short messaging system (SMS). Payment methods must be accessible to persons with disabilities, not require a membership, not affect the power flows to vehicles, and provide access for those that have limited English proficiency



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(See Section IV.D.8 Operations, Maintenance and Reporting);
and

- Community Benefit (See Section II.E. Community Benefit.

Proposals requesting direct financial assistance from the District will receive a lower score under the *Approach to Project, Design, Business Model, and Phasing* evaluation criteria.

2. Technology Preference

The District's preference for the ZE Truck Stop is to develop the site under a phased approach, with additional phases triggered as BEV technology becomes more viable and demand increases.

The first phase of development should include opportunity and depot/overnight charging with no less than ten (10) EVSEs with CCS connector type that can each accommodate up to 350 kW direct current (DC) fast chargers, or best available technology at the time of construction. The District is open to also utilizing additional charging capacities (i.e., 120 kW, 180 kW) for depot/overnight charging. All EVSEs should be equipped with dual charging capabilities, allowing two trucks to be charged simultaneously. Additionally, the integration of distributed energy resources shall be incorporated into this first phase of development.

All EVSEs must be installed by a qualified technician that is certified through the Electric Vehicle Infrastructure Training Program (EVITP).

D. Land Use Information – Port Master Plan

The District has a certified Port Master Plan (PMP) which serves as the governing land use document for Tidelands consistent with the requirements of the California Coastal Act.

The site falls within the National City Bayfront: Planning District 5 of the PMP, subarea Northern Industrial, and is zoned for Industrial, Maritime Related. Permitted uses may include manufacturing, storage, transportation facilities, and distribution. The District will need to issue a non-appealable Coastal Development Permit for the project, which would require Board approval. In addition, the selected Proposer will be required to comply with the CEQA, which may require additional entitlement and permit processing. Further, the District reserves its sole and absolute discretion to approve, disapprove, condition, select an alternative, or impose mitigation measures in relation to any CEQA analysis, and Coastal Act approval or other required discretionary approvals.



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E. Community Benefit

The District serves as an environmental steward of Tidelands in and around San Diego Bay and as such, is committed to improving the quality of Tidelands and its surrounding environments and the people that live there. The MCAS is a community focused clean air plan with a vision of “Health Equity for All” and recognizes the importance of improving the environmental health of Portside Communities that have been disproportionately and inequitably burdened by air quality impacts and other forms of environmental pollution. With this in mind, the District seeks a proposal that provides a benefit to the West National City community. This can be anything from committing to planting trees in nearby residential areas off Tidelands, to providing light duty BEV charging at the ZE Truck Stop at no cost to the community. The District is open and encourages creativity.

III. INSTRUCTIONS TO PROPOSERS

A. Vendor Registration and eBid System

The San Diego Unified Port District has implemented an electronic bidding (eBid) system which has a vendor registration component. All Service Providers are encouraged to register and any Service Providers who wish to provide a proposal for this RFP or other District solicitations are required to register. To register with the District as a Vendor, please visit the District website, www.portofsandiego.org and click on Business/Register as a Vendor. For questions and/or comments, please contact the District’s Procurement Services Department at 619-686-6392.

B. Information Exchange Meetings

The District will conduct two Information Exchange Meetings: the first will be in hybrid format (Microsoft TEAMS and in person) and the second will be an in person site visit.

The first meeting in hybrid format will be on Wednesday May 10, 2023 at 11:00 AM in the Training Room of the San Diego Unified Port District Administration Building, located at 3165 Pacific Highway, San Diego, CA. 92101 or via [Microsoft TEAMS](#). The purpose of this meeting is to cover the requirements to submit your proposal, the Equal Opportunity Program requirements and to give a brief review of the Scope of Services.

The second Site Visit Meeting will be an open house format on Tuesday May 16, 2023 from 10:00 AM to 12:00 PM at the proposed site located at the intersection of 19th Street and Tidelands Avenue in National City, CA, 91950, directly south of the District’s General Services Building located at 1400 Tidelands Avenue. The purpose of this meeting is to provide Proposers an opportunity to visit the site and view existing conditions. District staff will be available to answer questions regarding the Scope of Services.

Neither the first Information Exchange Meeting nor the second Site Visit Meeting are mandatory; however, all prospective Proposers are encouraged to attend.



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C. Examination of Proposal Documents

By submitting a proposal, the Proposer represents that it has thoroughly examined and become familiar with the work required under this RFP, and that it is capable of performing quality work to achieve District's objectives.

D. Questions

Questions or comments regarding this RFP must be submitted electronically to our eBid system where the RFP was downloaded and must be received by District no later than June 2, 2023 at 2:00 PM PT. All electronic questions must be received by this time. Responses from the District will be communicated via the eBid system to all recipients of this RFP. Inquiries received after the date and time stated above will not be accepted.

E. Addenda

If changes to the RFP are required, the District will issue an addendum to all Proposers via the eBid system. All Proposers will receive an email notifying them that an addendum has been issued. **All Addenda, if any, must be acknowledged via the eBid system.**

F. Electronic Submission of Proposals

1. All Proposers are required to submit their proposals electronically via the electronic eBid system they downloaded this RFP. The maximum file size for proposal is 150 megabytes, and the file type shall be Portable Document Format (PDF) and Microsoft Excel for the pro forma file. The electronic system will close submission exactly at the date and time set forth in this RFP or as changed by addenda. An electronic copy of the Proposal must be attached to the electronic system.
2. Proposers are responsible for submitting and having their proposal accepted before the closing time set forth in this RFP or as changed by addenda. NOTE: Pushing the submit button on the electronic system may not be instantaneous; it may take time for the Proposer's documents to upload and transmit before the proposal is accepted. It is the Proposer's sole responsibility to ensure their document(s) are uploaded, transmitted, and arrive in time electronically. The District will have no responsibility for proposals that do not arrive in a timely manner, no matter what the reason.

G. Required Documents

1. The proposal must contain the following items placed in the order listed:



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- a. Attachment A, Statement of Qualifications
- b. Attachment B, Proposer's Sub-Service Providers
- c. Attachment C, Equal Opportunity Program Bonus Points
- d. Attachment D, Statement Regarding Diversity, Equity, and Inclusion
- e. Attachment E-1, Employment and Ownership Report
- f. Attachment E-2, Employment and Ownership Report *Excel*
- g. Attachment F, Proposers Small Business Enterprise (SBE) Plan
- h. Proposal Package:
 - i) Response Cover Letter
 - ii) Attachment G – High Level Proposal Summary
 - iii) Sub-Service Providers
 - iv) Proposal Package (See *Section IV, Proposal Package Instructions*)

2. The District will conduct a preliminary review of the proposals to determine if the above items are included as required in the RFP. If a proposal does not include all items fully completed, the proposal may be considered not responsive.

H. Agreement Type

There may be one or more actions brought before the Board prior to entering into a long-term agreement with one or more Proposer(s). Processing the agreement and associated project reviews will be subject to cost recovery in accordance with BPC Policy No. 106. Long-term agreements may be in the form of a ground lease or a management/operating agreement and shall not exceed 20 years in term.

I. Rights of District

This RFP does not commit the District to enter into an Agreement, nor does it obligate the District to pay for any costs incurred in preparation and submission of proposals or in anticipation of an Agreement. District may investigate the qualifications of any Proposer under consideration, require confirmation of information furnished by the Proposer, and require additional evidence or qualifications to perform the Services described in this RFP.

The District reserves the right to:

1. Reject any or all proposals.
2. Issue subsequent Requests for Proposals.
3. Request changes to Proposals at any time during the process without issuing another Request for Proposals.
4. Postpone opening for its own convenience.
5. Remedy technical errors in the Request for Proposals process.



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6. Approve or disapprove the use of particular Proposer's Sub-Service Providers.
7. Negotiate with any, all, or none of the Proposers.
8. Solicit best and final offers from all or some of the Proposers.
9. Award an Agreement to one or more Proposers.
10. Accept other than the lowest offer.
11. Waive informalities and irregularities in proposals.

J. Collusion

By submitting a proposal, each Proposer represents and warrants that its proposal is genuine and not a sham or collusive or made in the interest of or on behalf of any person not named therein; that the Proposer has not directly or indirectly induced or solicited any other person to submit a sham proposal, or any other person to refrain from submitting a proposal; and that the Proposer has not, in any manner, sought collusion to secure any improper advantage over any other person submitting a proposal.

K. Withdrawal of Proposals

A Proposer may withdraw their proposal before the expiration of the time for submission of proposals by going to the eBid system and removing their submission.

IV. PROPOSAL PACKAGE INSTRUCTIONS

A. Format

1. Proposers shall include the required items stated in *Section III Instructions to Proposers*, Paragraph G, Required Documents.
2. Proposals shall be (1) in printed text, (2) as brief as possible, and (3) not include any unnecessary promotional material.
3. For ease of handling, it is requested that standard 8 -1/2 x 11" size pages be used, and that the proposal shall be submitted in Portable Document Format (PDF) format and Microsoft Excel for the pro forma file. **THE PROPOSAL SHALL BE ONE DOCUMENT ONLY, with the pro forma file as an attachment in Microsoft Excel format.**
4. The nature and form of response are at the discretion of those responding but shall include the information listed below.

B. Content



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1. Response Cover Letter.

- a. The Proposer shall submit a response cover letter that summarizes why the Proposer believes they should be selected by the District to provide services as described in this RFP.
- b. Proposers shall provide in the Response Cover Letter the name of the authorized representative(s) who has the authority to enter into a binding agreement and authorize changes to the scope, terms, and conditions of the agreement if selected. The information should include: Name and Title, Name of Firm, Address, City, State, Zip, Telephone Number, and E-Mail Address.
- c. The Proposer shall identify whether they are submitting the proposal as a developer/owner, an operator/manager, or both. State the prime proposer, whether they are a joint venture, a consortium, or another entity.

C. Attachment G – High Level Proposal Summary. Proposers **MUST** download, complete and submit this form from the link provided in the referenced section of this RFP.

D. Proposal Package for ZE Truck Stop. Proposers shall submit a proposal containing the following components and contents, which shall be consistent with the Port Act, California Coastal Act, Port Master Plan, and Maritime Clean Air Strategy.

1. **Approach to Project.** Proposers shall present a well-conceived plan that establishes that the Proposer understands and has the ability to achieve the highest quality ZE Truck Stop. Proposers shall provide a detailed project description, project design concept drawings, and project schedule as further described below. If Proposers are not proposing to develop **and** operate the ZE Truck Stop, the operator must be identified as a sub-proposer.
2. **Business Model.** The District seeks a tenant for a long-term lease under a hybrid public private partnership (PPP) business model. Provide a description of the proposed business model (e.g., charging as a service), including proposed revenue-generating mechanisms and cost-recovery strategies, consistent with *Section II.C. Specifications* of this RFP. Clearly describe how users will access and utilize the equipment or services. Indicate any assistance anticipated from the District, including direct or indirect non-monetary assistance and in-kind or direct financial assistance, if applicable. If



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the proposed business plan relies on use of funding from the LCFS and/or grant funding, describe the Proposer's plan for securing such funds. Describe the resources and actions needed to ensure the long-term viability of the ZE Truck Stop. Describe how you expect to work with the local utility, SDG&E. Please indicate the minimum lease terms required for the proposed investment. The District is offering a maximum lease of twenty (20) years. Also, please identify how you will prioritize trucks serving the District's marine cargo terminals.

The Proposal shall address the proposed Business Model consistent with Scope of Services described in *Section II.C.1 Business Models* of this RFP.

3. **Project Narrative.** Proposers shall provide a narrative describing its vision for the ZE Truck Stop, including proposed additional uses beyond charging (e.g., convenience store, taco shop), unique characteristics, and preliminary name/branding of the ZE Truck Stop or components within the ZE Truck Stop). The narrative should provide a high-level summary of the proposed development and architectural concept including:
 - a. **Phasing.** Please explain plans to scale up development as business grows and **identify how many phases and what development will be included in each phase.** For each phase, identify where on the site it will be located, how much area will be required, what type and quantity of EVSEs will be utilized (manufacturer, model, and capacity), how many spaces will be allocated for trucks to charge, for both opportunity and overnight charging, additional uses, and distributed energy resources. Phase one shall include at a minimum ten (10) EVSEs. **Also, please identify a trigger or measurable thresholds that will prompt construction of each subsequent phase (e.g., specific utilization rate).**
 - b. **Integration of distributive energy resources** (e.g., solar canopy over charging stations, microgrid, etc.). Please specify how this would add value to the project (e.g., benefits).

The Project Description shall be consistent with *Section II.C.2 Technology Preference* of this RFP.

- c. **Operation, Maintenance, and Reporting.** Please prepare an ongoing Operation, Maintenance, and Reporting Plan consistent with *Section IV.D.8 Operation, Maintenance, and Reporting* of this RFP.



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- d. **Community Benefit.** Please prepare a community benefit proposal that identifies a benefit that will be provided to the West National City community, consistent with *Section II.E. Community Benefit* of this RFP.
- 4. **Site Design.** Provide a description of the proposed development concept and identify the parcel(s) to be included in the site design, consistent with *Section II.B Site Description*. The concept should include:
 - a. **Conceptual design, capacity and configuration potential.** Describe a conceptual site design, indicating how the proposed site can be maximized through several phases (including identifying where each phase will be located and what it will include). The site design shall include the square footage required, number of EVSEs and associated stalls, and how the site will support opportunity and depot/overnight charging. Identify proposed EVSE charging capacities (i.e., kilowatt capacity), connector type(s), and certifications (e.g., UL-listed) and type and location of distributed energy resources proposed.
 - b. **Estimated costs.** Please provide an estimated cost for all phases of the ZE Truck Stop concept, breaking costs out by phase. This includes estimated costs associated with the design and construction of infrastructure to support the BEV charging facilities. Please list the assumptions used to derive the estimated capital costs. The District understands that these are preliminary costs and subject to change.
 - c. **Estimated development schedule.** Provide a high-level estimated development schedule, including the timeframe for site design, entitlements, permitting, construction, and commissioning. The District understands that initiating subsequent phases beyond Phase 1 will be based on increased demand and improved viability of the technologies, as discussed in *Section II.C.2 Technology Preference* above.
 - d. **Distributed energy resources, energy management, and energy storage.** Describe the distributed energy resources and energy management strategies that will be incorporated into the site to reduce energy costs and improve energy load management.



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5. **Project Design Concept Drawings.** All drawings should be legible, orient north up and should only include one plan or elevation/perspective per sheet. At a minimum, Proposers shall provide a site plan, elevations and context/perspective drawings, as detailed below.
- a. **Site Plan.** The site plan should illustrate the proposed phased concepts for the ZE Truck Stop, including, for each phase, proposed structure footprints, proposed charging stalls and associated equipment, location for opportunity and overnight charging, preliminary landscape design, parking spaces, and ingress and egress points. The site plan should clearly distinguish area allocations, among commercial uses, stalls and associated equipment for opportunity and overnight charging, distributed energy resources, circulation, and public areas.
 - b. **Elevations.** Provide colored architectural exterior elevations and a comprehensive view of the ZE Truck Stop and illustrate proposed materials and colors and any related architectural elements.
 - c. **Context/Perspective Drawings.** Provide a representative illustration of the proposed project clearly showing massing and the relationship to adjacent structures, finished grades, open spaces, and streetscapes. This drawing should clearly illustrate the relationship of the proposed project to the adjoining street and neighborhood. The perspective should show the proposed development in context with the adjacent building masses. Context elements do not need to be photo-realistic, but must accurately convey the bulk, scale, and character of the surrounding area.

The project design shall be consistent with *Section IV.D.4 Site Design* of this RFP.

6. **Project Team and Relevant Experience.** Include a complete but succinct description of the proposed project team **including sub-service providers**, key personnel, and project experience as outlined below.
- a. **Project Team**
 - i) Identify each project team member, their firm (if different from the primary Proposer), and their roles and responsibilities. In addition, identify the entity with



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the legal authority to execute any and all real estate agreements on the Proposer's behalf;

- ii) Provide a brief description of each project team member's firm size, local organizational structure, experience within the state of California and its Coastal Zone and financial profile, capacity, and resources;
- iii) Provide a brief description of each team member's experience developing, operating and/or managing (as applicable) projects within the last ten (10) years that are relevant to the proposed ZE Truck Stop, with an emphasis on clean technology, transportation logistics, and freight.
- iv) For each team member, identify any lawsuit or litigation in the last five years, whether pending, settled, or adjudicated, involving (a) any public operations undertaken by any team member or (b) any type of operations where claims or settlements were paid by the Proposer or its insurers
- v) Describe the project team's approach to project management and oversight throughout the term of the Project, including responsibilities for day-to-day project management, reporting, scheduling, cost management, document management and risk management;
- vi) Include an organizational chart diagramming the project team members' relationships, including any joint venture partners and other consultants.

NOTE: If Proposer intends to form a new entity to be the contracting entity under the real estate agreement, Proposer must also submit a description of that new entity, including its organizational structure, key personnel and financial and operational wherewithal, together with a draft copy of the proposed partnership, management, operating or other formation agreement with its proposal. Proposer will be required to form the new entity within thirty (30) days from selection and failure to do so may result in revocation of its selection.

- b. Key Personnel.** Identify key personnel proposed to work on the proposed ZE Truck Stop. The persons listed will be



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considered committed to the project with no substitutions allowed without prior agreement by the District. A resume or biography for each person shall be submitted and not exceed one (1) page each. Each key personnel shall demonstrate the following:

- i) At least ten (10) years of experience in proposed Project role;
- ii) Worked on a minimum of three (3) projects similar to the proposed Project.

- c. **Project Experience.** Provide project examples demonstrating the project team's experience in the past ten (10) years related to the envisioned scope of development and experience within the state of California and its Coastal Zone. Proposers are limited to a maximum of six (6) projects. Proposers are encouraged to provide examples where team members have collaborated on the same project (as applicable).

Individual examples shall not exceed one (1) page for a total of six (6) pages. Project examples shall include, but are not limited to, the following information:

- i) Name of the project
- ii) Location (address) of the project
- iii) Firm's role on the project
- iv) Project Executive and Project Manager
- v) Project description
- vi) Mix of uses included in the project
- vii) Size of the project and development value
- viii) Type of construction
- ix) Photo of project

7. Project Financials.

- a. **Capability to Perform.** The District reserves the right to consider the financial responsibility and reputation within the industry of each Proposer to determine if the Proposer has the actual ability to successfully perform and complete all responsibilities that the Proposer may assume and undertake in connection with the Project and achieve the highest quality Zero Emission Truck Stop as identified in *Section II Scope of Services* of this RFP.



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- i) Proposers shall provide a preliminary financing plan that describes the Proposer's approach to financing the Project, identification of any perceived challenges to financing the Project, and proposed solutions to meet these challenges. In addition, Proposer shall include the following information:
 - a) The entity responsible for financing the proposed ZE Truck Stop and a summary of comparable projects financed by this entity over the past five (5) years
 - b) A description of anticipated sources of funding for the proposed ZE Truck Stop
 - c) Financing expectations including loan to cost, interest rate, term and cost of financing
 - d) Letters of interest from equity partners or lenders (if available). If letters of interest are not available, identification of proposed target partners and previous experience with such partners
 - e) Target developer/equity provider returns for the proposed ZE Truck Stop
 - ii) Proposers shall provide the most current annual audited financial statements for at least the past two (2) years or other comparable evidence of financial capability, in addition to any other information reasonably necessary to establish the Proposer's financial capability as may be requested by the District.
- b. Development and Operating Pro forma.** Proposers shall provide a detailed pro forma in Microsoft Excel format which demonstrates an understanding of the District's objective to achieve the highest quality ZE Truck Stop as outlined in Section II of this RFP. The file shall contain formulae so that cell calculations are traceable, can be verified, with no hard coding. Include at a minimum, the following information:
- i) A summary of anticipated funding sources and development uses at each of the following phases of the proposed ZE Truck Stop: (1) predevelopment period, (2) construction period for each proposed phase, (3) first phase of infrastructure operations and maintenance, (4) each subsequent infrastructure phase thereafter for operations and maintenance;



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- ii) A detailed all-in development budget including a breakdown of all anticipated direct, indirect, marketing and preopening, and financing costs and any development team fees. The development budget should cover the predevelopment and construction periods of the proposed ZE Truck Stop. In addition, the development budget should provide per unit cost assumptions whenever possible;
- iii) Anticipated demand, utilization, and utility rate forecasts and the assumptions underlying the forecasts;
- iv) Anticipated financing terms and calculation of annual debt service; and
- v) A life-of-the-project (e.g., ten-year or twenty-year) operating projection for the proposed ZE Truck Stop, which includes, at minimum, the following details on an annual basis:
 - a) Revenues and expenses detailed by category;
 - b) Undistributed expense details;
 - c) Fixed expense details, including management fee and reserves for replacement;
 - d) Debt service payment if applicable;
 - e) Ground lease payment; and
 - f) Residual cash flow to equity/owner.

The District understands the speculative nature of these projections.

- c. Funding Assistance & Grants.** The District expects the selected Proposer to propose a strategy to ensure maximum funding from local, state, and federal resources, such as grants, incentives, and utility make-ready programs. Upon award, the selected Proposer is expected to work with the District and SDG&E utility to develop a deployment schedule that maximizes funding opportunities identifying current and future funding to execute the vision for the ZE Truck Stop.

Please indicate how the proposed business may leverage grants, incentives, make-ready programs, subsidies or District-supplied real property, services, or utilities that are assumed in the Proposal. If the proposed pro forma assumes



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direct financial or in-kind assistance from the District, please be specific, indicating the projected amount, length of time for assistance, and what it is needed for.

- d. **Lease Terms.** Please indicate the proposed minimum lease term necessary to substantiate the infrastructure investment; this should be conveyed in the required pro forma (See *Section IV.D.7.b. Development and Operating Pro forma*). The District is offering a maximum lease of twenty (20) years and is flexible on rent terms.

8. **Operation, Maintenance & Reporting.** The District seeks a Proposer to not only develop the ZE Truck Stop, but also to perform the ongoing operation, maintenance, and reporting requirements. Within the Proposal, please prepare an ongoing Operation, Maintenance, and Reporting Plan. Within this Plan, please identify:

- a. Accessible payment methods (see *Section II.C.1. Business Models*)
- b. Customer Service Program to resolve issues
- c. Languages that will be accommodated through the Customer Service Program
- d. Proposer's approach to publishing prices (by \$/kWh), real-time availability, and location(s)
- e. Interoperability of EVSEs
- f. Data Reporting

Regarding data collection for reporting, please specify the proposed software, if any, and how it will offer a comprehensive managed charging solution. Raw data shall be provided in CSV format and summarized in a PDF document.

The following data shall be reported to the District on a quarterly basis:

- i) Energy delivered per hour, in kWh of electricity
- ii) Maximum demand (in kW) per hour
- iii) Number of trucks serviced, per hour
- iv) Utilization rate of equipment
- v) Maximum capacity utilized (demand in kW/total capacity in kW) per hour
- vi) Maximum occupancy (number of occupied chargers/number of total chargers in service) per hour
- vii) Uptime percentage



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- viii) Reports about major down time, malfunction or unavailability of equipment due to failure or maintenance.
- ix) Avoided greenhouse gas (GHG) emissions

V. EVALUATION AND SELECTION

A. Evaluation Criteria

Proposals will be evaluated based on staff's assessment of how well the proposed project accomplishes the purpose of the RFP to finance, design, build, own, operate, maintain, and expand a ZE Truck Stop to support MCAS ZE Truck goals and objectives. **All criterion identified within the proposal package will be evaluated (see Section IV.D of this RFP).**

B. Equal Opportunity Program Bonus Points

The following criteria shall be used to evaluate Proposer's Equal Opportunity Program based on specific criteria identified below. Proposers shall be eligible for bonus points on the following criteria: ADA Scope Enhancement, Staffing, Veterans Staffing, and Small Business Enterprise (SBE) Participation. Proposers can receive up to 20 total bonus points under the Equal Opportunity Program.

1. **ADA Scope Enhancement:** The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has included ADA Enhancements that are above the minimum requirements and within the scope of services, including taking into consideration Universal Design. The Proposer shall submit written documentation to support their ADA Enhancements for District's review and consideration.
2. **Staffing.** The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has staff with disabilities as defined by the ADA, or that has included one or more Disabled Veteran Business Enterprise (DVBE) subcontracting firm(s). The Proposer shall submit DVBE certification documentation and list workforce data reporting number of total employees with disabilities as defined by the ADA.
3. **Veteran's Status.** The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has Veteran's status or has staff with Veteran's status. Documentation of a firm's Veteran's status must be provided or workforce statistical data reporting number and percentage of total employees with Veteran's status is required.



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4. **Small Business Enterprise (SBE) Participation** (See Section VII.C.4.). The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has SBE status. Documentation of a firm's SBE status must be provided for SBE Bonus Points. If claiming SBE status, indicate, as applicable, on Attachment A, Question D (for prime Proposer) and/or on Attachment B (for Sub-Service Providers).

C. Evaluation Procedure

1. A Selection Review Panel, generally made up of District staff, will review the proposals and establish a list of finalists based on pre-established review criteria. The names of the Selection Review Panel members are not revealed prior to the interviews. The Selection Review Panel may interview the finalists. If interviews are conducted, the Proposer should allow approximately 1 hour for the oral interview and a question-and-answer session. The Project Manager must lead a 10-12 minute presentation before the Selection Review Panel.
2. Interviews may be conducted on August 15 and 16, 2023. Each Proposer is asked to keep these dates open. No other interview dates will be provided.
3. The Selection Review Panel will evaluate the proposals. The rating and evaluation forms prepared by Panel members will not be revealed. The scores in the evaluation matrix shown below **DO NOT** indicate a "winning score" and the highest score is not guaranteed selection. The final decision is at the discretion of the District and is based on the scores, reference checks, negotiated pricing, and further analysis of the proposals including any risks associated with selecting any proposal.

Evaluation Criteria	Weight	Firm A		Firm B		Firm C	
		Score	Total	Score	Total	Score	Total
Approach to Project, Design, Business Model, and Phasing	10						
Distributed Energy Resources	6						
Community Benefit	3						
Project Team and Relevant Experience	8						
Project Financials	9						
Operation, Maintenance, and Reporting	7						
Totals							



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ADA Scope Enhancement						
DVBE/Disabled Staff						
Veterans Status						
SBE Participation						
Grand Total						

- D. Award.** When the Selection Review Panel has completed its work, the District may negotiate for the extent of services to be rendered and the method of compensation. Because District may award without conducting negotiations, the proposal submitted shall contain the Proposer's most favorable terms and conditions.

VI. EQUAL OPPORTUNITY PROGRAM REQUIREMENTS

Respondents will be required to provide ADA staffing data using a form similar to Attachment F. Respondents will have an opportunity to earn bonus points during the RFP based on ADA, Small Business Enterprise (SSE) Participation using a form similar to Attachment C, Disabled Veteran Business Enterprise (DVBE), and Veteran's status workforce data.

A. Equal Opportunity Contracting Policy Statement

1. It is the policy of the Port that all businesses be provided equal opportunity to participate in the performance of Port contracting and leasing opportunities, and to insure that, workers on public works projects of one thousand dollars (\$1,000) or more are paid the general prevailing rate of per diem wages for regular, holiday, and overtime work as provided by California Labor Code Section 1771.

The District is committed to take all necessary and reasonable steps to increase its utilization of small businesses for a positive economic impact to the region. District policy prohibits discrimination against any person because of age (over 40), ancestry, color, disability (mental or physical), gender (including identity, appearance, or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with the person's sex at birth), marital status, medical condition, military status, national origin, pregnancy, race, religion, sexual orientation, genetic information, or veteran status, in the award or performance of District contracts or leases.

2. The Port will create a level playing field on which small businesses can compete fairly for Port contracts. This policy will help remove barriers to the participation of small businesses in Port contracts and assist in the development of firms to compete successfully in the



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marketplace outside the Port's Equal Opportunity Contracting Program.

B. Americans with Disabilities Act Requirements

1. Americans with Disabilities Act (ADA) Policy

- a. The Port does not discriminate on the basis of disability in employment and complies with the ADA, and all other applicable federal, state, and local laws, regarding barrier-free access to all Port services, programs, and activities.
- b. In conjunction with BPC Policy No. 361, it is the Port's policy not to discriminate against qualified individuals with disabilities in regard to application procedures, hiring, advancement, discharge, compensation, training, or other terms, conditions, and privileges of employment.
- c. An individual with a disability, who can be reasonably accommodated for a job, without undue hardship to the Port, will be given the same consideration for that position as any other applicant. Additionally, the Port will engage in an interactive process to attempt to reasonably accommodate qualified individuals with disabilities so they can perform the essential functions of a job. All employees are required to comply with safety standards.
- d. The Port is committed to ensure all services, programs, and activities are accessible and usable by all individuals except where to do so would result in a fundamental alteration in the nature of the service, program or activity, or in undue financial and administrative burdens.

To ensure high visibility, the Port will participate in community outreach events, report on activities that further enhance accessibility, and consider the use of Universal Design, which is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design, to support and include people with disabilities in all services, programs, and activities as appropriate.

- e. In conjunction with BPC Policy No. 361, the Port will promptly investigate all complaints of employment discrimination and barriers to services, programs, and activities, and when appropriate, take effective remedial action to address and



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remedy any complaints.

- f. The Executive Director will designate person(s) responsible for developing and implementing the Port's ADA program and ensuring that Port employees, agents, lessees, and Service Providers adhere to the provisions of the ADA program.
- g. The ADA program will be implemented at the same priority as compliance with all other legal obligations incurred by the Port.

C. Small Business Enterprise (SBE) Participation

1. Respondent will be required to submit an SBE Plan in the RFP stage, including goals for Design, Construction and Leasing/Operations (see sample SBE Plan in Attachment F). Respondent should make good faith efforts to include small businesses in their solicitation process. SBE eligibility is based on economic size standards determined by number of employees or gross receipts. The SBE Plan recognizes both federal and state size standards for small businesses. Small business concerns can be certified as SBEs by the U.S. Small Business Administration, State of California, Department of General Services, or any U.S. Department of Transportation, Disadvantaged Business Enterprise (DBE) certification using Title 49 Code of Federal Regulations Part 26 criteria.

The Port's Small Business Enterprise Program utilizes external resources in their search for small businesses to participate on contract opportunities. This information is maintained and updated by those sources and their registered clients. Businesses that are registered within these data sources claim they meet the federal or state size standards to qualify as a small business. Please be aware that the Port's Small Business Enterprise program does not control or guarantee the accuracy, or completeness of this outside information. Questions regarding a small business size protest should be addressed with the outside source.

NOTE: Equal Opportunity Contracting Certified Small Business data resources are available at www.portofsandiego.org. Click on the About the Port Tab, then, click on the Doing Business with the Port link, then click on Equal Opportunity Contracting Program "link", scroll down to the SBE resource links. Click on any of the six (6) SBE database resource links. This will provide you with small business sub-participants to contact for sub-contracting opportunities on specific work categories pertaining to this project. If you do not have access to the Internet, please contact the Diversity, Equity, and Inclusion Department at (619) 821-6209.



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2. Equal Employment Opportunity Policy Statement. It is the policy of the San Diego Unified Port District (District) that all service providers, vendors, contractors and lessees conducting business with the District shall not discriminate against any employee or applicant for employment because of age (over 40), ancestry, color, disability (mental or physical), gender (including identity, appearance, or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with the person's sex at birth), marital status, medical condition, military status, national origin, pregnancy, race, religion, sexual orientation, genetic information or veteran status, and shall take action to assure that applicants and employees are treated without regard to age (over 40), ancestry, color, disability (mental or physical), gender (including identity, appearance, or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with the person's sex at birth), marital status, medical condition, military status, national origin, pregnancy, race, religion, sexual orientation, genetic information or veteran status.

Questions regarding Section VIII or Americans with Disabilities Act Requirements of this opportunity should be directed to:

Cheryl Smoot
DEI Business & Community Partner
Phone: (619) 821-6209
E-mail: csmoot@portofsandiego.org

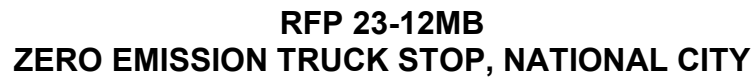
- VII. INDEMNIFY, DEFEND, HOLD HARMLESS.** Proposer will indemnify the District as stated in the Sample Agreement.
- VIII. INSURANCE REQUIREMENTS.** Proposer and each Proposer's Sub-Service Provider will at all times during the term of this Agreement maintain, at its expense, the minimum levels and types of insurance as stated in the Sample Agreement.
- IX. PROTESTS**
- A. Prior to the closing date for submittal of the proposals, Proposer may submit to District protests regarding the procurement process, or alleged improprieties in specifications or alleged restrictive specifications. Such protests shall be filed no later than 10 working days prior to the scheduled



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closing date. If necessary, the closing date of the solicitation may be extended pending a resolution of the protest. Protests dealing with alleged improprieties in the procurement or the procurement process that can only be apparent after the closing date for receipt of proposals shall be filed within five (5) working days of issuance of the Notice of Recommended Award. Protests shall contain a statement of the grounds for protests and supporting documentation. Protestor will be notified of District's final decision prior to issuance of Award.

- B. A Proposer may discuss the procurement documents with the District. Such discussions, however, do not relieve Proposers from the responsibility of submitting written protests as required.
- C. Requests and protests shall be addressed to: San Diego Unified Port District, Attn: Matt Earle, Chief Procurement Officer, 1400 Tidelands Avenue, National City, CA 91950.





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or Explain if necessary: _____

I, _____ (PRINT NAME), affirm that all the information furnished in and with this questionnaire, is true, complete and correct to the best of my knowledge.

(Signature)

(Date)



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MINIMUM QUALIFICATIONS

Firms submitting proposals should meet the following minimum qualifications. Please answer “yes” or “no”, and include an explanation, As Needed.

1. Proposer has a liability insurance policy with a policy limit amount as required on the Sample Agreement or a statement from their broker that the Proposer can have such insurance in place after notice of award.

☐ **Yes** ☐ **No**

2. Proposer has current workers’ compensation insurance policy as required by the Labor Code or is legally self-insured pursuant to Labor code section 3700 ET. Seq. or is exempt because Proposer has no employees. Proposer has continuously had workers’ compensation insurance or state approved self-insurance.

☐ **Yes** ☐ **No** ☐ **Exempt**

3. Proposer has automobile liability insurance policy with a policy limit of at least \$1,000,000 per claim or a statement from their broker that the Proposer can have such insurance in place after notice of award.

☐ **Yes** ☐ **No**

4. At any time during the last five years, has your firm, or any of its owners or officers been convicted of a crime involving the bidding, awarding or performance of a government contract or agreement?

☐ **Yes** ☐ **No**

5. Is your firm currently in a bankruptcy case, in Chapter 11, an applicant for Chapter 11, or an adjudicated bankrupt?

☐ **Yes** ☐ **No**



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SPECIAL QUALIFICATIONS

Proposers should provide the following information relevant to its operations as the basis for evaluation:

6. OTHER REQUIRED RESPONSE INFORMATION

A. REFERENCES

Provide a list, including names, addresses, and phone numbers of at least three (3) clients that your firm has served within the last two (2) years with a scope of service similar to this RFP. By providing references, you are authorizing the District to contact such clients for an appraisal of the services they received from your firm.

Client Name, Address and Phone Number	Number of Years performing similar scope of services	Describe services provided

B. PENDING LITIGATION

Are you, or any of the principals in your organization holding more than a 10% interest, presently a party to any pending litigation, liens, claims or judgments?

☐ **Yes** ☐ **No**

If yes, provide detailed information for each action. Include a listing of any lawsuit or litigation and the result of that action resulting from (a) any public project undertaken by the Proposer or by its Sub-Service Providers where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years.



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C. CONFLICT OF INTEREST

Does the company have any existing or potential conflicts of interest with the District?

☐ **Yes** ☐ **No**

If yes, attach a statement detailing the conflicts of interest.



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**ATTACHMENT B
PROPOSER'S SUB-SERVICE PROVIDERS**

Name, Address and DIR Registration Number (if applicable) of Sub-Service Provider	Type of Service	SBE Type (DBE, WBE etc.)	*Certifying Agency	**Percent of Service	Dollar Value of Services

* Must provide copy of SBE Certification.

**Must provide percentages of work to be subcontracted. If unknown, what is your overall percentage for all subs combined for the project?



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**ATTACHMENT C
EQUAL OPPORTUNITY PROGRAM BONUS POINTS**

STAFFING: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has staff with disabilities as defined by the ADA, or that has included one or more Disabled Veteran Business Enterprise (DVBE) subcontracting firm(s). The Proposer **MUST** submit DVBE certification documentation and workforce statistical data reporting number and percentage of total employees with disabilities as defined by the ADA.

Acceptable Agency DVBE Certification documentation: Central Contractor Registration (CCR) or State of California Department of General Services (DGS)

Is your firm claiming DVBE or Staffing bonus points? Yes___ No___

Please complete workforce statistical data:

Job Group	Disabled Staff	
	#	%
Officials/Managers		
Professionals		
Technicians		
Sales Workers		
Admin Support		
Craft Workers		
Operators		
Laborers		
Service Workers		
Total:		



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VETERAN'S STATUS: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has Veteran's status or has staff with Veteran's status. **Documentation of a firm's Veteran's status is acknowledged through the firm's good faith by completing the statistical data report listed below.**

Is your firm claiming Veteran's Status bonus points? Yes___ No___

Please complete workforce statistical data:

Job Group	VETERANS STATUS	
	#	%
Officials/Managers		
Professionals		
Technicians		
Sales Workers		
Admin Support		
Craft Workers		
Operators		
Laborers		
Service Workers		
Total:		



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**ATTACHMENT D
STATEMENT REGARDING DIVERSITY, EQUITY, AND INCLUSION**

Proposers represent that they are an equal opportunity employer, and it shall not discriminate against any subconsultant, employee or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, gender, gender expression, sexual orientation, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination.

Provide here a written statement of Proposer's commitment to diversity, equity, and inclusion, which shall include a commitment and brief description of its plan to implement good faith efforts to recruit subconsultants and employees in a non-discriminatory manner.

ATTACH ADDITIONAL SHEETS IF NECESSARY



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ATTACHMENT E



Employment and Ownership Report

Submitted to:

**Diversity, Equity, and Inclusion
Port of San Diego**

Submitted by:

Name of Business	
Contact Person	
Address	
City, State, Zip Code	
Phone Number	
FAX Number	
E-Mail Address	
Date	
Signature	

The submittal of this information and subsequent DEI updates and/or reports required by Agreement language is for recordkeeping and tracking purposes only and will not be used as a basis for decisions, unless Service Provider fails to provide such information.



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Employment Report [PLEASE COMPLETE ATTACHMENT E. EXCEL VIA PLANETBIDS ATTACHMENT]

A.

Job Categories	Number of Employees – Report Employees in only one category																					
	Race/Ethnicity																					
	Women							Men							Nonbinary							Total Col A-U
	White	Black or African American	Hispanic	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or More Races	White	Black or African American	Hispanic	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or More Races	White	Black or African American	Hispanic	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or More Races	
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	
Executives																						
Mid-Level Executives																						
Professionals																						
Technicians																						
Sales Workers																						
Admin Support																						
Craft Workers																						
Operatives																						
Laborers																						
Service Workers																						
Total																						



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ATTACHMENT F
PROPOSERS SMALL BUSINESS ENTERPRISE PLAN

[PLEASE COMPLETE FORMS IN WORD FORMAT]

INSERT COMPANY NAME AND DATE

OBJECTIVE: That small businesses have equal opportunity to participate in the performance of design, construction, and leasing opportunities. To accomplish this

objective, the District encourages respondents to conduct outreach to Small Business

Enterprises (SBE), and implement programs and processes to implement the District's policy.

1. **INSERT COMPANY NAME** is committed to take all necessary and reasonable steps to increase utilization of SBEs for a positive economic impact to the region. INSERT COMPANY NAME agrees to implement programs and processes designed to assist in the creation of business ventures/opportunities so that SBEs can share in the economic activities generated by the **Zero Emission Truck Stop, National City** project. These programs and processes shall be designed to promote SBE opportunities during the design, construction, and leasing of the project. This agreement shall not apply to any other INSERT COMPANY NAME project.
2. **SBE OUTREACH:** INSERT COMPANY NAME shall conduct SBE outreach event(s) to the SBE community for subcontracting opportunities with the project. Due to the length of the project, more than one outreach event may be needed. INSERT COMPANY NAME shall conduct outreach notifications to SBEs as needed to meet the proposed SBE participation goal(s).

Certification of all SBEs shall be required. Any SBE certified by California Department of Transportation (CALTRANS), California Department of General Services (DGS), System for Award management (SAM), or certified by any federal, state, or local agency shall be deemed certified for purposes of this project.

3. **DESIGN/CONSTRUCTION:** INSERT COMPANY NAME will use good faith efforts to achieve ____ percent or more of the total costs incurred in connection with the design and construction of the project to be incurred pursuant to contracts with certified SBEs. Good faith efforts must be documented and submitted if the SBE goal is not attained.
4. **LEASING/OPERATIONS:** INSERT COMPANY NAME will use good faith efforts to achieve ____ percent or more of the total costs incurred in connection with the leasing and operations of the project to be incurred pursuant to contracts with certified SBEs. Good faith efforts must be documented and submitted if the SBE goal is not attained.
5. **REPORTS:** Monthly utilization reports for each certified SBE subparticipant during the design and construction phase of the development shall be requested successful proposer.



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Zero Emission Truck Stop, National City
Small Business Enterprise Program Participant

Complete this form for each SBE identified as part of respondent's team.

A. SBE Participants

Name of SBE:	
Address of SBE:	
Phone Number/Email of SBE:	
Contact for SBE:	
Type of Business:	
Project Phase:	☐ Design Phase ☐ Construction Phase ☐ Leasing/Operations Phase

B. SBE Participation

____ Percent of SBE participation based on the estimated total dollar value of the project (if the goal is not met, attach good faith efforts documentation).

C. SBE Certification

Certifying Agency:	Expiration Date:
--------------------	------------------

D. SBE Scope of Work

Describe the scope of services to be performed by the SBE:
--

E. Assurance of SBE Participation

Describe the steps to be taken to ensure SBE participation at the indicated percentage:



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Attach the following documents:

- ☐ SBE Certification
- ☐ Good Faith Efforts Documentation if applicable
- ☐ Signed Letter of Commitment to SBE

F. **Respondents Good Faith Efforts Documentation**

Good faith efforts are those that could reasonably be expected to result in goal attainment. At a minimum, each respondent will be expected to have taken the following actions to ensure a level of SBE participation, which equals __% of the estimated dollar value of the agreement:

- Advertised in general circulation, business journals, or minority focus media concerning opportunities;
- Provided written notice to a reasonable number of specific businesses including SBEs and their interest in the opportunity is solicited, in sufficient time to allow businesses to participate effectively;
- Followed-up initial solicitations by contacting them to determine with certainty whether they are interested;
- Selected portions of the opportunity to be performed by subcontractors in order to increase the likelihood of meeting the SBE goal;
- Provided interested businesses with adequate information about the requirements of the RFP, or Public Works;
- Negotiated in good faith and not rejecting businesses as unqualified without sound reasons based on a thorough investigation of their capabilities;
- Made efforts to assist interested businesses in obtaining bonding, lines of credit, insurance or other requirements of the District or respondent; and
- Effectively used the services of available minority, business and community organizations, local, state, and Federal business assistance offices, and other organizations that provide assistance in the recruitment of SBEs.

If respondent is unable to achieve the __% SBE goal stated herein, respondent is required to provide documentation of its actions taken to actively and aggressively achieve the SBE goal. The District will examine the quantity and intensity of respondent's efforts as well as the type of actions taken. Efforts that are merely pro



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forma are not sufficient, even though they may be sincerely motivated.

Documentation List:

- A.* Copies of all advertisements
- B.* Copies of small business resources
- C.* Copies of all written solicitation responses
- D.* Copies of phone log/ follow up calls
- E.* Copies of written correspondence
- F.* Copies of internet solicitations with responses
- G.* Copies of any business assistance if applicable
- H.* Verifiable details on how you used the services of available minority business and community organizations, local, state, and Federal business assistance offices, and other organizations that provide assistance in the recruitment of SBE.



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**ATTACHMENT G
HIGH LEVEL PROPOSAL SUMMARY**

[PLEASE COMPLETE VIA PLANETBIDS ATTACHMENT]