January 14, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Award of Agreement for the Purchase of Electric Vehicle Chargers and Energy Management System

Overview

The Orange County Transportation Authority uses a variety of light-duty vehicles to support bus operations. Operator relief vehicles are light-duty vehicles used primarily to relieve coach operators in the field while on duty. On August 10, 2020, the Board of Directors approved the purchase of up to 55 battery electric vehicles to replace the current fleet of compressed natural gas-powered operator relief vehicles. Board of Directors' approval is requested to execute an agreement to purchase required electric vehicle charging stations with an energy management system to support the battery electric vehicle fleet.

Recommendations

A. Approve the selection of ChargePoint, Inc., as the firm to provide up to 72 electric vehicle charging stations with an energy management system.

B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2692 between the Orange County Transportation Authority and ChargePoint, Inc., in the amount of $484,331, to provide up to 72 electric vehicle charging stations with an energy management system, for a five-year initial term effective February 1, 2021 through January 31, 2026, with one, three-year option term.

Discussion

The Orange County Transportation Authority (OCTA) currently owns, operates, and maintains a fleet of vehicles used to support bus operations, transit police services, administrative staff pool vehicles, and department-assigned vehicles. These vehicles are referred to as non-revenue vehicles.

Fifty-five of those non-revenue vehicles are used as operator relief vehicles (ORV) in support of bus operations. The ORVs are primarily used to relieve bus operators in the field while on duty. The current ORV fleet is comprised of 55 compressed natural gas-powered vehicles that are in the process of being replaced by battery electric vehicles (EV). The new vehicles require daily charging via dedicated charging stations to maintain the required state of charge and operating range.

The charging stations will provide the necessary charging infrastructure to supply the energy needed to recharge the battery EVs and manage the energy being utilized to minimize operating costs through specialized energy management software. The total charging infrastructure will include up to 60 non-pay charging stations to be used for the ORV fleet, ten pay-per-use charging stations for visitors and employees, and two pay-per-use fast chargers for visitors and employees. The fast chargers will also be used for the ORV fleet when a quick charge is needed. The energy management software will allow staff to monitor and adjust energy usage, view real-time charging status for each vehicle, set pricing and charging policies, as well as many other useful features. This procurement also includes an extended warranty and a maintenance agreement that will ensure that the charging stations are available to meet service demands.

Procurement Approach

The procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for professional and technical services. Various factors are considered in the award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On November 12, 2020, Request for Proposals (RFP) 0-2692 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on November 13 and 16, 2020. A pre-proposal conference was held on November 17, 2020, with five attendees representing five firms. Two addenda were issued to make available the pre-proposal conference registration sheet and presentation, as well as respond to written questions.

On December 3, 2020, five proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Maintenance and Motorist Services, Maintenance Resource Management and Facilities Engineering departments, as well as an external

evaluator from Dahl, Taylor & Associates, Inc., who served as the subject matter expert for this project met to review the proposals received.

The proposals were evaluated based on the following evaluation criteria and weightings:

- Qualification of the Firm 30 percent
- Staffing and Project Organization 20 percent
- Work Plan 25 percent
- Cost and Price 25 percent

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted highest at 30 percent to emphasize the importance of the proposing firms having relevant experience in EV charging station and energy maintenance services. The success of this project demands a firm that has demonstrated comprehension of the specifications with a proven history of similar project delivery, project management, and installation support. Staffing and project organization was assigned 20 percent to ensure the firms have the knowledgeable and experienced staff to perform the requested services. The work plan was given the weight of 25 percent to address the proposing firm's approach and ability to deliver maintenance services, furnish charging stations, and provision of communication utility infrastructure to charging stations. Cost and price was also weighted at 25 percent ensure competitive pricing and that OCTA receives value for the services provided.

On December 8, 2020, the evaluation committee reviewed five proposals based on the evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order to participate in the interviews:

Firm and Location

ChargePoint, Inc. (ChargePoint)
Campbell, California

PCS Energy, LLC (PCS)
Culver City, California

On December 14, 2020, the evaluation committee conducted interviews with both firms. During the interview, each firm had the opportunity to present its approach for delivering the requested EV charging stations and services, project team qualifications, and respond to evaluation committee questions. Firms were requested to include a live demonstration of proposed software solutions in their

presentation. Firms described the features and specifications of the proposed chargers, such as the manufacturing lead time, useful life, and warranty. The firms also discussed their experience of installation and operations of chargers for fleet vehicles. Both firms were also asked specific clarification questions related to OCTA's requirements specified in the scope of work.

Based on the evaluation of the written proposals and responses from the interviews, the evaluation committee is recommending ChargePoint for consideration of the award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

ChargePoint was founded in 2007 and is headquartered in the city of Campbell, California. The firm is solely dedicated to design and manufacture charging hardware. It operates as a one-stop shop offering a turn-key solution for charging infrastructures, energy management software, a payment platform, and a fleet vehicle management system. The firm has installed over 125,000 EV chargers for 8,000 customers. During the interview, ChargePoint confirmed that it has experience of installing chargers for a fleet of 7,000 vehicles. ChargePoint's proposed subcontractors are required to go through ChargePoint's training and certification program to prevent any operational issues with the charging stations. The firm's customers include the County of Orange and the cities of Anaheim and Long Beach.

PCS was founded in 2016 to offer renewable energy solutions for organizations and properties. It has installed over 10,000 EV chargers and has experience in working with charger manufacturers, software providers, and contractors for EV charger installations. During the interview, PCS confirmed that it has not yet had the experience of installing chargers for fleet use. While it has working experience with Los Angeles Department of Water and Power, its customer base is mostly commercial property management firms, such as Moss & Company Property Management and Beverly Hills Properties.

Staffing and Project Organization

ChargePoint's proposed project team demonstrated experience in providing EV charging station and an energy management system (EMS). The proposed account director has 23 years of experience in technology and knowledge in EV solutions. Key personnel proposed by ChargePoint include a regional sales manager as the second point of contact and a support manager as the technical contact. All proposed personnel have been with the company over six years.

ChargePoint's staffing plan also includes additional personnel to provide project support and oversight from its executive team. During the interview, ChargePoint's team fully demonstrated the understanding of project nature and ensured the project will meet the scope of work requirements.

PCS' proposed main account contact demonstrated relevant project experience and is based in the City of Los Angeles. PCS proposed its vice president of operations as the project oversight for procuring all necessary equipment, tools, and providing guidance for EV chargers delivery and installation. Other key personnel proposed by PCS include its vice president of EV construction, who will be in charge of EV charger infrastructure installations, and subcontractor's key personnel for overseeing the process and execution of the software solutions. All proposed PCS personnel have been with the company from two to four years.

Work Plan

ChargePoint's proposal demonstrated extensive knowledge and understanding of each task specified in the scope of work with examples showing how its charging system will perform on OCTA's vehicle. From the live demo during the interview, ChargePoint demonstrated its software applications ability to meet the needs and requirements specified in the scope of work. Detailed responses to each requirement specified in the scope of work were also clearly presented in its work plan. ChargePoint's proposed equipment is highly modular for ease of installation, service, and operations. ChargePoint manages spare parts via its support and operations teams and can be consigned spare parts as needed. The firm's work plan also included a sampling of reports that provides detailed and comprehensive reporting capabilities through its network platform. ChargePoint's system offers a 98 percent guaranteed uptime. During the interview, the firm demonstrated a solid approach to deliver a successful project, as required.

PCS' proposal demonstrated an understanding of the overall project. PCS' proposed subcontractor will manage all software solutions and end-user training of the networking technology. PCS will oversee quality and budget control. The software solutions proposed by PCS' subcontractor requires operators to use radio frequency identification tap cards to initiate charging. Additionally, PCS' work plan does not include a sampling of reports. PCS proposed two different brands of EV charger equipment, due to neither charger company providing a full solution. During the interview and the demo of software solutions, PCS demonstrated the ability to meeting the requirements

specified in the scope of work through its proposed subcontractor for the software solution.

Cost and Price

Pricing scores were based on a formula, which assigned the highest score to the lowest total pricing for charging station and EMS, and scored the other proposal's total pricing based on their relation to the lowest total pricing. ChargePoint proposed the lower total pricing.

Procurement Summary

Based on the evaluation of the written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of ChargePoint as the firm to provide up to 72 electric vehicle charging stations with EMS.

Fiscal Impact

Funding is included in OCTA's Fiscal Year 2020-21 Budget, Maintenance Resource Management accounts 2159-9026-D2113-0ZF and 2159-9026-D2113-0DC.

Summary

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2692 with ChargePoint, Inc., in the amount of $484,331, to provide up to 72 electric vehicle charging stations with energy management system, for a five-year initial term, with one, three-year option term.

Attachments

A. Review of Proposals, RFP 0-2692: Electric Charging Station and Energy Management System
B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 0-2692: Electric Charging Station and Energy Management System
C. Contract History for the Past Two Years, RFP 0-2692: Electric Charging Station and Energy Management System

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