



REQUEST FOR QUOTE (RFQ) – BID# 7478367

ENERGY MANAGEMENT CONSULTING SERVICES - MPA-488

SUBMISSION DEADLINE: Monday, August 05, 2013 at 11:00 AM (ET)

PRE-BID CONFERENCE: **NO**
 YES _____

Mandatory: **NO**
 YES: Any vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory pre-bid conference. The representative must register at the pre-bid conference and disclose the identity of the vendor whom he/she represents. Because attendance at the pre-bid conference is mandatory, a vendor’s failure to attend and register at the pre-bid conference shall result in disqualification of the vendor’s bid proposal as non-responsive to the solicitation.

Buyer Name: **Gail Walsh**
Title: **Chief Buyer**

QUESTIONS concerning this solicitation must be received by the Division of Purchases at (gail.walsh@purchasing.ri.gov) no later than (Monday, July 22, 2013, 5:00 PM (ET)). Questions should be submitted in a *Microsoft Word attachment*. Please reference the bid number (Bid #7478367) on all correspondence. Questions received, if any, will be posted on the Rhode Island Division of Purchases website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: **NO**

BOND REQUIRED: **NO**

PUBLIC COPY (R.I. Gen. Law 37-2-18(j)): This requirement applies to all public works projects (vertical and horizontal) exceeding Five Hundred Thousand (\$500,000) dollars and any combination of base bid plus all alternates.

DISK BASED BID: **NO**
 YES: See attached Disk Based Bidding Information

NOTE TO VENDORS:
Vendors must register on-line at the Rhode Island Division of Purchases website at www.purchasing.ri.gov. Offers received without the completed four-page Rhode Island Vendor Information Program (RIVIP) Generated Bidder Certification Cover Form attached may result in disqualification.

THIS IS NOT A BIDDER CERTIFICATION FORM



Disk Based Bidding Information

File Format

All disk based bid files are ZIP files that you can open using the WinZip 8.1 software. The ZIP file will contain one or more files based on the type of Bid/RFP.

Downloading the Disk Based Bid

Bids that have a file for download are marked with a "D" in the Info field of the bid search results. The "D" will be an active link to the WinZip file until the bid reaches its opening date. Clicking on the active "D" link will allow you to open or save the ZIP file associated with the bid. Opening the WinZip file will download a copy to your computer's temporary directory.

Opening the Disk Based Bid

Once downloaded, you can open the ZIP file with WinZip and view the Microsoft Office files contained within the WinZip file. Immediately save (extract) the individual files to an appropriate directory on your computer, such as "Desktop" or "My Documents".

FOR THE DEPARTMENT OF TRANSPORTATION AND OTHER SPECIFIC PROJECTS:

Completing the Disk Based Bid

Once the Microsoft Office files are properly saved, open the individual files and enter the required information in the appropriate fields. Save each file again to capture the new information you entered.

Submitting the Disk Based Bid

Save the completed files to a CD or diskette. Label the CD or diskette with the Bid/RFP number and bidder's name (company name, not contract name). Submit as instructed in the Bid or RFP solicitation document.

Request for Letters of Interest
Energy Management Consulting SERVICES

The Rhode Island Department of Administration, Division of Purchases, on behalf of the Rhode Island Department of Education (RIDE), is requesting proposals and statements of qualifications from interested individuals and organizations to provide Energy Management Consulting Services to RIDE on an as-needed basis by entering into a Master Price Agreement (MPA-488) with the State of Rhode Island, in accordance with the terms of this solicitation and the General Conditions of Purchase (available at www.purchasing.ri.gov).

This is a Request for Proposals, not an Invitation for Bid: responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those respondents who have submitted proposals.

The State reserves the right to award this MPA to multiple vendors or a single vendor. The intent of this solicitation is to establish a Master Price Agreement to be used for services on an "as needed" basis. Inclusion as a qualified service provider on a Master Price Agreement is no guarantee of income.

Political Subdivisions (cities, towns, schools, quasi-public agencies), as authorized by law, may participate in this Agreement. All ordering and billing shall be between the vendor and the political subdivision (only).

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS

Potential offerors are advised to review all sections of this Request carefully, and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content, shall be borne by the offeror. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

Proposals misdirected to other State locations or which are otherwise not present in the Division of Purchases at the time of opening for any cause will be determined to be late and may not be considered. The "Official" time clock is in the reception area of the Division of Purchases.

In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This will be a requirement only of the successful bidder (s).*

Offerors are advised that all materials submitted to the State of Rhode Island for consideration in response to this Request for Proposals will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws.

Also, Submitters should be aware of the State's MBE requirements, which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, contact the State MBE Administrator at (401) 574-8253 or charles.newton@doa.ri.gov. Visit the website <http://www.mbe.ri.gov>

Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this LOI.

Equal Employment Opportunity (RIGL 28-5.1)

§ 28-5.1-1 Declaration of policy. – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via email Raymond.Lambert@hr.ri.gov.

It is intended that an award pursuant to this RFP will be made to a prime vendor(s) who will assume responsibilities for all aspects of the work. The State reserves the right to award to multiple vendors. Joint venture and cooperative proposals will not be considered. Subcontracts are permitted, provided that their use is clearly indicated in the offeror's proposal, and the subcontractor(s) proposed to be used are identified in the proposal.

All proposals should include the vendor's FEIN or Social Security Number as evidenced by a Form W-9, downloadable from the Division of Purchases' website at www.purchasing.ri.gov.

RIGL 37-13-3.1 State public works contract apprenticeship requirements. * (a) Notwithstanding any laws to the contrary, all general contractors and subcontractors who perform work on any public works contract awarded by the state after passage of this act and valued at one million dollars (\$1,000,000) or more shall employ apprentices required for the performance of the awarded contract. The number of apprentices shall comply with the apprentice to journeyman ratio for each trade approved by the apprenticeship council of the department of labor and training.

ARRA SUPPLEMENTAL TERMS AND CONDITIONS

For contracts and sub-awards funded in whole or in part by the American Recovery and Reinvestment Act of 2009. Pub.L.No. 111-5 and any amendments thereto, such contracts and sub-awards shall be subject to the Supplemental Terms and Conditions for Contracts and Sub-awards Funded in Whole or in Part by the American Recovery and Reinvestment Act of 2009. Pub.L.No. 111-5 and any amendments thereto located on the Division of Purchases website at www.purchasing.ri.gov.

BACKGROUND/OVERVIEW

There are substantial opportunities for efficiencies in the maintenance and operations of school facilities in Rhode Island. Because operations and maintenance represents one of the greatest life cycle expenses of owning a facility, it is critical to assist Local Education Agencies (LEAs) in identifying problems and opportunities. In particular, properly executed operations and maintenance programs that target energy efficiency have been shown to bring significant savings without substantial capital investments. The design, construction, operation, and maintenance of our school facilities to conserve energy and water helps to provide operational savings. School districts have seen their budgets cut in these tough economic times. These potential savings would allow LEAs to reallocate funds into the classroom.

To determine areas of excess energy use in their facilities, LEAs should conduct energy audits to identify potential efficiencies and energy savings. With such audits, LEAs can prioritize buildings for energy-saving projects and determine the proper options to correct these inefficiencies.

This Request for Proposals is to solicit responses that are aligned with the School Construction Regulations so that services may be obtained in a timely fashion for specific projects of work. No estimate or commitment to a specific level of spending or to a specific project is made by this request; however, all projects authorized under the MPA that result from this request will be supported by a written agreement that details the scope of work, tasks, deliverables, project schedule and budget. Vendors selected under this solicitation will be placed on the qualified vendor list for MPA #488 and will be subject to the state's General Conditions of Purchase (available at

www.purchasing.ri.gov), the terms of this request, and any specific terms and conditions set forth in MPA #488.

SCOPE OF THE WORK

The Energy Management Consultant must provide:

Energy Audits - Audit school buildings for the purpose of identifying and prioritizing energy efficiency projects that will produce considerable energy savings, emission reductions, and a reduction of the school's carbon footprint. Each audit will allow up to eight hours of on-site inspection at the district's facilities. The audit will consist of a general review and analysis of the overall state of the facility pertaining to energy usage, HVAC systems, energy management control systems, lighting, production processes and equipment. Additionally, consideration may be given to effectiveness of windows, insulation, or other weatherization opportunities. The audits will include an analysis of the school's energy usage and costs and compare to other gas and electric utility rate tariffs. In addition, the audit will include an EPA Portfolio Manager run for all facilities.

Upon completion of an on-site inspection, the vendor shall prepare a written report, which will include a summary of description of the findings or the on-site inspection and specific recommendations for improving energy efficiency for the building. Recommendations for specific projects will include an analysis of the amount of potential energy savings in energy units and dollars, a simple payback analysis and a description of each evaluated energy efficiency measure project with a payback of more than one year. Recommendations must also include at least three operational and maintenance measures (having paybacks of less than one year).

The vendor will prepare a separate report of each building facility evaluated. At the conclusion of the audit, the auditor will prepare a list of recommended retrofit projects that is prioritized based upon the greatest savings/return on investment and quickest payback. In addition, the vendor shall be able to format such report so that it can be included in a district's Necessity of School Construction application.

Workshops – The vendor will prepare and present energy management workshops to Local Education Agencies on an as needed basis. Each workshop will be a half-day educational program and should include brochures and/or handouts that will educate and assist facilities managers in energy management efforts. The vendor will also show attendees how to use EPA's Portfolio Manager so that the LEA will be able to track and assess energy and water consumption.

At the conclusion of the workshop, the vendor will verify that building staff members are well-trained and possess the documentation they need to operate and maintain the building's systems and equipment after turnover.

In general, applicants must have excellent written and oral communications skills; the ability to interact effectively with a wide variety of constituencies; and ASHRAE standard and NECHPHS protocol knowledge. Respondents must also be able to cope with a high degree of variety of work, manage complex and demanding activities, meet agreed-upon timelines, and work independently.

Appendix A contains budget detail sheets.

TERMS OF THE AGREEMENT

The Master Price Agreement will begin upon issuance of a state purchase order (on or about **September 1, 2013**) and end **June 30, 2016**. The State retains the option of granting a time extension of up to **12 months**.

COST PROPOSAL

Offerers are to price their services for the term of the MPA. Cost proposals should specify pricing for year 1 (approx. 10 months), year 2, year 3, and the option year 4. If only one set of prices are offered, that pricing will remain constant through the term of this MPA.

The cost proposal for each year must be prepared using the budget detail sheets found in Appendix A. These forms require the bidder to indicate the hourly rates for salary and fringe by name (if available) and position title for all personnel that may work on a project. The form provides space for the cost of consultants that the bidder may hire and for other expenses that the bidder may charge. Actual names are not required, and position titles for staff and consultants whose names are to be determined (TBD) may be indicated. Travel may be estimated by the cost of mileage or a day's travel by car or a single trip by air. If the bidder requires an administrative fee, please enter this in the "other expense" category and indicate the percent of direct costs of the fee.

Costs, as evidenced by hourly rates or per diem fees, are a weighted factor in the bid evaluation process. The state reserves the right to award on the basis of cost alone, to accept or reject any or all options, bid proposals, and to act in its best interest.

Placement of a vendor on the MPA **does not** guarantee income. Vendors will be contacted on an as needed basis, and all actual costs for each project will be negotiated upon award of a specific project to a specific vendor under this MPA.

PROPOSAL SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at gail.walsh@purchasing.ri.gov no later than the date & time listed on the cover sheet of this solicitation. **Send your questions in Microsoft Word format.** Please reference the LOI # on all correspondence. Questions received, if any, will be posted and answered on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. For computer technical assistance, call the helpdesk at 401-222-3766 or lynda.moore@doit.ri.gov.

Proposals to provide the services covered by this request must be received by the Division of Purchases on or before the date & time indicated on page one of this solicitation.

Proposals (an original plus 4 copies) should include the following:

1. A completed and signed four-page RIVIP Bidder Certification Cover Form, available at www.purchasing.ri.gov.
2. A **separate sealed** Cost Proposal as described above.
3. A *separate* Technical Proposal (see below) describing the qualifications and background of the applicant and experience with similar programs, as well as the work plan or approach proposed for this requirement.
4. A completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at www.purchasing.ri.gov. **Please include with original proposal only.**
5. In addition to the multiple hard copies of proposals required, respondents are requested to provide their proposal in electronic format (CD). Microsoft Word / Excel or PDF format is preferable. Only 1 electronic copy is requested.

Proposals, clearly marked "**RFP #7478367 – Energy Management Consulting Services – RI Dept. of Education**", should be delivered to:

Department of Administration
Division of Purchases
One Capitol Hill
Providence, Rhode Island 02908

The bidder assumes all responsibilities for proposals submitted by mail or commercial delivery service. Proposals misdirected to other state locations or which are otherwise not present in the Office of Purchases at the time of opening, for any cause, will be determined to be late and may not be considered. Proposals faxed, or emailed, to the Division of Purchases will not be considered.

TECHNICAL PROPOSAL REQUIRED ELEMENTS / EVALUATION CRITERIA

1. Technical Approach **(20 points)**.
 - Describe your proposed approach to energy management consulting. Include a description of your team and their areas of participation.
2. Organizational Capacity **(15 points)**
 - Provide a brief summary of the history, goals, and key achievements of you/your organization related to the purpose and priorities of this solicitation.
 - Submit an organizational chart if one is available. Provide a summary of you/your organization's overall budget and describe you/your organization's capacity to manage projects.
3. Energy Management Experience and Expertise **(20 points)**
 - Describe you/your organization's experience and expertise in the areas of energy efficiency technology and energy audit analyses for commercial, industrial or municipal facilities.
 - Provide two examples of energy audits you/your organization have/has performed within the last two years.
 - Include three (3) references and/or letters of recommendation.
4. Energy Management Staffing **(15 points)**
 - Outline the major responsibilities and related qualifications of each staff position in your organization.
 - Include full resumes.
 - Describe how you/your organization will select, supervise, and evaluate any consultants hired. Highlight areas where you expect to supplement staff expertise with consultant expertise.
5. Cost Proposal **(30 points)**
 - This evaluation criterion will focus on the appropriateness, reasonableness, and competitiveness of the cost proposal, comprised of the respondent's comprehensive hourly rates and travel costs/administrative costs, if applicable.

Offerors must receive a minimum of 70 technical points, out of a possible 100, to gain status as an approved service provider on MPA # 488. Placement on the Master Price Agreement approved service provider list is no guarantee of income. The State reserves the right to negotiate pricing.

NOTWITHSTANDING THE ABOVE, THE STATE RESERVES THE RIGHT TO AWARD ON THE BASIS OF COST ALONE, TO ACCEPT OR REJECT ANY OR ALL OPTIONS, BID PROPOSALS, AND TO ACT IN ITS BEST INTEREST.

PROPOSALS FOUND TO BE TECHNICALLY OR SUBSTANTIALLY NON-RESPONSIVE AT ANY POINT IN THE EVALUATION PROCESS WILL BE REJECTED AND NOT CONSIDERED FURTHER.

THE STATE MAY, AT ITS SOLE OPTION, ELECT TO REQUIRE REPRESENTATION (S) BY OFFERORS CLEARLY IN CONSIDERATION FOR AWARD.

APPENDIX A

Budget Detail Sheets BUDGET DETAIL SHEET

FISCAL YEAR _____

SALARY AND FRINGE BENEFIT DETAIL

NAME	POSITION TITLE	HOURLY RATE WITH FRINGE \$
TOTAL REQUEST		

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

* Please provide a separate sheet for each state fiscal year. The state fiscal year is July 1st through June 30th. Cost proposals should specify pricing for year 1 (approx. 4 months), year 2, year 3, year 4 and the option year 5. If only one set of prices are offered, that pricing will remain constant through the term of this MPA.