



## REQUEST FOR PROPOSALS

### **Energy Performance Benchmarking and Reporting**

The Mid-Ohio Regional Planning Commission (MORPC) is requesting proposals from firms to provide professional services for Energy Data Benchmarking and Tracking.

MORPC is a voluntary association of local government communities in the 15 county Central Ohio area. Our organization strives to enhance the quality of life and competitive advantages of Central Ohio by working through local governments and other constituents. A catalyst for change, evidence of MORPC's work is seen every day through planning, programming and services in the areas of housing, transportation, water, land use, economic development, environment, public policy and technology. We assist our local government members by providing innovative solutions for the many challenges facing our growing region.

Consultants interested in being considered must submit **in a PDF format by e-mail**. Proposals will be received by MORPC until **12:00 pm (ET), May 22, 2017**.

**Submit proposals to:**

Mid-Ohio Regional Planning Commission

Subject: Energy Performance Benchmarking and Reporting

Attn: Rebecca Garrett

[rgarrett@morpc.org](mailto:rgarrett@morpc.org)

Proposals must arrive in the MORPC offices prior to the proposal due date and time. Firms making proposals should take this into account. Consultants may propose to complete all or a portion of the scope of services.

All questions must be submitted in writing and should be submitted via email to Rebecca Garrett at [rgarrett@morpc.org](mailto:rgarrett@morpc.org). No answers will be given over the phone. Written answers, including any amendments to the RFP if necessary will be posted on MORPC's website. Responses to questions will be posted at <http://www.morpc.org/about-morpc/overview/rfpsrfgs/index>.

Neither MORPC nor any member agency of the Committee shall be liable for any costs incurred by the consultant in response to this RFP, or any costs incurred in connection with any discussions, correspondence or attendance at interviews or negotiation sessions.

All materials submitted in response to this RFP shall become the property of MORPC and may be returned only at MORPC's option.

All materials received shall be considered public information and shall be open to public inspection.

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## I. BACKGROUND

The Mid-Ohio Regional Planning Commission (MORPC) is a voluntary association of Central Ohio governments and regional organizations that envisions and embraces innovative directions in transportation, energy, housing, land use, the environment and economic prosperity. Our makeup is representative of the rural, urban and suburban communities that comprise our burgeoning region. In addition, our transformative programming and innovative public policy are evident throughout the 15 counties we serve.

A key area of MORPC's work sustainability and its Sustainability Advisory Committee, which address important regional issues affecting environmental sustainability and quality of life. Focus areas include air quality, energy, local food, water resources, trails, materials use, growth and planning. Currently, the 2017 – 2020 Regional Sustainability Agenda is the guiding document for MORPC's sustainability-focused programming and committees, and provides the framework for members and regional partners to work toward common goals. Included is a goal to reduce per capita energy consumption and promote alternative fuel resources to increase affordability and resilience of regional energy supplies. MORPC is developing and implementing solutions and tools to encourage local communities to meet sustainability goals.

## II. SCOPE OF SERVICES/PROJECT SCOPE

MORPC seeks a qualified firm to utilize commercially available user-friendly software to benchmark local government buildings and operations in Central Ohio. It is anticipated that achieving this goal will require data collection, benchmarking, reporting, outreach, customer service and analysis of energy and water performance of properties. The intention of this initiative is to support local governments and partners to reduce energy consumption and related emissions in their buildings and transportation operations. The successful firm must provide an existing online utility benchmarking platform and demonstrate the proven ability to provide innovative ideas and solutions for MORPC and local governments in accomplishing these goals.

Specific program services and tasks:

1. Provide an online benchmarking and reporting tool with proven, successful track record.
  - o Gather energy, water, street lighting, transportation fleet, utility and other sustainability metrics for properties and operations to be benchmarked with ability to collect historical, multi-year data to support analysis.
  - o Define the total number of buildings and operational units the platform database can support.
  - o Provide a list of important characteristics to be included, for example building type, size and year built; fleet vehicles number, type, age, and vehicle miles traveled; fuel types, others (please specify).
  - o Include functionality and reporting in support of project goals.
  - o Provide list of reporting features, as a minimum to include data from local utilities, integration with Portfolio Manager, visual dashboard and export capabilities to other software (i.e. excel), energy use intensity, fuel type, end usage metrics, ability to normalize data, other (please specify).
2. Develop and implement benchmarking training
  - o Deliver effective training on use of benchmarking tool.
  - o Demonstrate to local officials and partners the benefits of utilizing benchmarking tools.

- Include the benefits of participation, how to use the tool, including generating and interpreting report to support decision-making on capital projects, operations and maintenance programs to reduce energy consumption and cost savings.
3. Ongoing support and reporting to track and analyze data and performance
- Provide support to local governments on data collected to monitor, troubleshoot and recommend opportunities to maximize performance.
  - Identify potential areas for capital improvements and recommendations for next steps.
  - Monitor the effectiveness of efficiency projects implemented over time.
  - Report progress in accomplishing project objectives.
  - Ability to leverage data for recognition initiatives (i.e. competitions to compare similar communities for reducing energy consumption) and local planning efforts to meet community sustainability goals.

### III. PROPOSAL FORMAT

The proposal must address the following items in the following order. Failure of the proposal to respond to a specific requirement may be a basis for elimination from consideration during the comparative evaluation. MORPC reserves the right to accept or reject any or all proposals.

Each consultant shall submit a formal proposal via e-mail and shall contain the following information:

- A) Cover Letter
- B) Organization, Personnel, Experience & Project Management
  - a. Consultant's Personnel Profile and Corporate Qualifications
  - b. Project Team Availability and Capacity
  - c. Project organization chart showing key personnel, their relationships and affiliations
- C) Consultant's Methodology/Work Plan
  - a. In-kind and Partnership Opportunities
- D) List and Description of Deliverables
- E) Project Schedule
- F) Budget or Cost Proposal

#### A.) COVER LETTER

The **cover letter** shall be signed by a representative authorized to legally bind the firm, and include:

- Name, telephone number, and e-mail address of a contact person with authority to answer questions regarding the proposal (ideally the day-to-day project manager for this work).
- Name, address, and phone number of a contact person to be notified regarding contractual issues.
- Identification of the firm as a corporation or other legal entity.

The letter shall state that the proposer:

- Has sole and complete responsibility for delivery of the required services.
- Is presently not debarred, suspended, proposed for debarment, declared ineligible or involuntarily excluded from covered transactions by any federal department or agency or the Ohio Department of Transportation.

***B.) ORGANIZATION, PERSONNEL, EXPERIENCE & PROJECT MANAGEMENT***

***CONSULTANT'S PERSONNEL & CORPORATE PROFILE***

Specific background information on key individuals who are anticipated to be assigned to the project should be included, most notably the project manager. The background information on these individuals would emphasize their experience relative to project requirements. A statement concerning the recent related experience of persons from your team who will be actively engaged in the proposed effort should also be included. Attach resumes of the project manager and other key personnel to the proposal.

Identify similar projects undertaken by your firm or proposed team firms a) within Ohio and b) in other states. Document each firm's actual responsibility on the project. Provide appropriate reference(s), name(s) and telephone number(s).

***PROJECT TEAM AVAILABILITY & CAPACITY***

Identify the location of the office where the majority of the work is to be performed. Discuss your staff's availability and capacity in the skill classes necessary to accomplish the work contemplated in the work elements as outlined in your technical approach. Specifically, break the staffing down by the number of professionals, technicians, and other specialists and indicate the number of each available for assignment to this project. Provide a list of the firm's present workload relative to capacity and availability to provide the requested services.

The consultant should note that as a condition of the contract the key persons, as defined by MORPC, assigned to the project for its duration must be substantially as represented in the proposal. MORPC reserves the right to cancel the contract and seek damages from the consultant in the event the consultant fails to provide the key personnel substantially as represented in the proposal.

***PROJECT ORGANIZATION CHART SHOWING KEY PERSONNEL, THEIR RELATIONSHIPS AND AFFILIATIONS***

This section shall provide an overview of each key personnel working on the project and show their relationship to the firm and their affiliations. It shall identify the firm's/team's principal-in-charge and the day-to-day project manager together with their qualifications as well as a brief outline of the potential roles and qualifications of other key personnel. If subcontracts are utilized, the position in the project team and identity of the sub-contractor shall be stated.

***C.) CONSULTANT'S METHODOLOGY/WORK PLAN***

This section shall indicate the consultant's understanding of the project scope of work, a definition of the scope of the project (including a discussion of the tasks to be performed to accomplish the scope of work), a definition of the final product, and the consultant's approach to the project (including the estimated time of completion for key tasks, phase deliverables, the management organizational chart, and identification of the Committee's roles in the project).

The consultant's proposal shall contain a step-by-step explanation and description of the methodology to be employed and how the methodology addresses MORPC's scope of work. The consultant's proposal shall further contain a detailed level of effort. Also, administrative information, such as the consultant's status reporting procedures and the consultant's approach to effective communication with MORPC personnel and sub-consultants, shall be included.

In addition, please explain any aspect of your method that is unique or innovative, including in-kind or partnership opportunities with mutual benefits provided.

**D.) LIST AND DESCRIPTION OF DELIVERABLES**

The consultant’s proposal shall list and describe the deliverables for each identified task that are part of the various steps of the methodology. All materials created and submitted throughout the lifetime of the projects related to the contract shall become the property of MORPC. All materials received shall be considered public information and shall be open to public inspection.

**E.) PROJECT SCHEDULE**

Included as part of the proposal, the proposer shall provide a schedule identifying all tasks and sub-tasks, all deliverables, and time in the scope of work. Target start date is June 2017.

**F.) BUDGET OR COST PROPOSAL**

This section shall also provide a full description and breakdown of the expected cost for the project. The proposal shall present a breakdown of hours and expenses by task and state fiscal year, the hourly billing rates for team members, and all non-labor expenses expected to be reimbursed this includes all direct labor costs by person or position, overhead costs, non-salary direct costs including any travel time, equipment costs, per diem, printing costs, any fees, subcontractor costs, conversion of data and delivery to MORPC incurred by the vendor/consultant. Total cost shall be indicated, as well as an estimated cost per task based on the tasks identified in the work plan.

If the price proposal is not received when due or if the proposal does not include requested information, that proposal may be dropped from further consideration.

The proposer should be aware that it is the goal of MORPC to process and pay properly prepared and submitted invoices within 60 days, although that is not guaranteed. Improperly prepared and submitted invoices will be returned and will consequently not be processed and paid within the 60-day goal. Proof of payment will be required for all charges included on invoices.

**IV. PROCUREMENT PROCESS**

**RFP TIMELINE**

The schedule for the RFP is given below. Dates are tentative and may be modified by MORPC as necessary.

Key Date	Event
May 8, 2017	Proposal is posted on MORPC website for interested parties to retrieve.
May 22, 2017	Completed proposals due to MORPC by Noon.
May 23, 2017	Proposals will be opened at 11:00 am.
May 23- 26, 2017	Evaluations of proposals.
May 30 - 31, 2017 (if required)	Oral presentations at MORPC, if required.
June 1, 2017	Evaluation Committee makes recommendation.
June 2, 2017	Contact all bidders regarding awards to be made
June 8, 2017	MORPC Board meeting to approve resolution/award contract
June 15, 2017	Contract finalized.
June 15, 2017	Project begins.

The selection of the project consultant will follow a multi-step process. The first step will be an evaluation of the written proposals using the criteria listed below.

### ***EVALUATION CRITERIA***

The evaluation criteria are as follows:

- Years of experience in data collection and benchmarking
- Proven online technology solution and cost
- Experience with developing and delivering training and education
- Proven capability with customer support
- Proven capability in managing ongoing data collection and analysis
- Proven capability to support achievement of project goals (i.e. reduction in energy consumption) supported through case study, reports, testimonials featuring local governments entities or similar community-based organizations
- In-kind or shared partnership opportunities

### ***EVALUATION COMMITTEE***

The Committee will conduct the evaluation of proposals and reserves the right to reject any and all proposals in whole or in part received in response to this request. The Committee may waive minor defects which are not material when no prejudice will result to the rights of any other consultants or to the public.

Oral presentations may be requested depending upon the relative merits of the proposals, two or three of the consultants will be invited to give an oral presentation and respond to questions from an interview panel. This step may be waived if the Committee finds from the evaluation in the first step that one team is clearly more qualified to perform the study than the other teams.

### ***CLARIFICATION INTERVIEWS***

At MORPC's option, the consultant may be required to answer questions about the proposal. The purpose of the interview is to provide clarification of information presented in the written proposal. If interviews are necessary, MORPC will contact the consultant's authorized representative to schedule the time, date, and method of interview (e.g. in-person presentation or conference call). The interview will be within two weeks of notification. The interview will be given by the Committee. If in-person interviews are requested, the consultant must comply at no cost or obligation to MORPC. A consultant's refusal to make a presentation as described shall result in the consultant's proposal being rejected from consideration for the project.

### ***SELECTION AND NEGOTIATIONS***

Based on the evaluation of the proposals, the most qualified consultant will be selected. If negotiation with the highest ranked consultant fails to result in a mutually acceptable agreement, MORPC will notify that firm in writing of the termination of negotiations. The next highest ranked consultant, as determined by the earlier technical proposal evaluation, will then be invited to enter into negotiations with MORPC. If negotiations again fail, the same procedure shall be followed, with each next most qualified firm until a contract has been negotiated. If the remaining proposals are considered not to be qualified, the notification and selection processes will be repeated.

## **V. PROPOSAL TERMS & CONDITIONS**

### ***Evaluation of Proposal Compliance with Specifications***

Understanding that no consultant may completely meet all requirements of the specifications, MORPC reserves the sole right to determine whether a proposal substantially complies with the specifications; accept, negotiate modifications to, or reject the terms of any proposal; and waive the right to accept a part, or parts, of a proposal, unless otherwise restricted in the proposal.

Modification and/or Withdrawal of Proposals

Modifications of a submitted proposal must be received by the designated due date specified. Withdrawal of proposals will be allowed only in those cases in which a written request to withdraw a Proposal is received by MORPC prior to the date and hour for receiving and opening Proposals. In such case, same will be returned to consultant unopened.

Proposer Qualifications

MORPC may require all proposers to submit evidence of qualifications, and may consider any evidence of the financial, technical, and other qualifications and abilities. MORPC will not award a contract to a proposer who, in its opinion, is not fully qualified on the basis of financial resources and responsibility, possession of adequate equipment, personnel, experience, and past record of performance to perform the obligation to be undertaken competently and without delay.

Award of Contract

Each consultant acknowledges that MORPC will use its discretion and judgment in making the final decision and further acknowledges that no claim by the consultant will arise in any way relating to the exercise of that judgment by MORPC. MORPC reserves the right to accept the Proposal deemed to be in the best interest of MORPC or to reject any and all Proposals.

MORPC's Executive Director is the only individual who may legally commit MORPC to the expenditure of public funds. No cost chargeable to the proposed contract may be incurred before receipt of either a fully executed contract or a specific, written authorization to proceed.

**GENERAL INFORMATION & REQUIREMENTS**

Deviation Clause

The consultant's attention is called to the condition that, if awarded a contract, the consultants will be required to furnish the particular item referred to in strict accordance with the specifications or descriptions as proposed, unless a departure or substitution is clearly noted and described in the proposal, along with the reasons therefore.

Tax Exemption

MORPC is exempt from the payment of federal excise and transportation taxes levied under the provisions of the Internal Revenue Code. MORPC is also exempt from Ohio State Gross Retail (sales tax). The successful consultants will be furnished with any certificates of exemption required.

Title VI of the Civil Rights Act of 1964

The Mid-Ohio Regional Planning Commission, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, minority business enterprise will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, creed, religion, ancestry, national origin, sex or gender, sexual orientation, disability or other handicap, age, marital/familial status, income, or status with regard to public assistance in consideration for an award.

**MORPC STATEMENTS ON DIVERSITY & INCLUSION**

Equal Opportunity

The consultant agrees that it will not discriminate against any employee, applicant for employment, or sub-contractor and that it will take affirmative action to insure that employees, applicants and sub-



contractors are treated equally during employment without regard to race, color, gender, creed, religion, ancestry, national origin, sexual orientation, disability or other handicap, age, marital/familial status, veteran status, or status with regard to public assistance.

### Disadvantaged Vendors

Disadvantaged Vendors shall have the maximum opportunity to participate in the performance of contracts financed under this solicitation. In this regard, all proposers shall take all necessary and reasonable steps to ensure that minority vendors have the maximum opportunity to compete for and perform any subcontracts. Also, proposing firms are encouraged to notify MORPC if they meet one of the disadvantaged vendor designations, such as Minority Business Enterprise (MBE), Small Business Enterprise (SBE), or Women-owned Business Enterprise (WBE).

### **CONTRACTING REQUIREMENTS**

The following are not part of the proposal requirements but will be requirements in the contract in addition to other contractual requirements. Please also note that prior to negotiation, the firm selected for negotiation must provide average hourly rates for personnel assigned and a copy of the last audited financial statement.

### Compensation

MORPC may utilize one of the following compensation models and proposals may indicate preference:

- A cost plus fixed-fee contract with a maximum contract amount will be entered into after negotiations between MORPC and the selected firm.
- A not-to-exceed contract amount based on satisfactory work performed and products and services produced will be entered into after negotiations between MORPC and the selected firm.

Alternative compensation models may be considered.

During contract negotiations, the selected firm must provide individually-priced and prioritized tasks to be completed "if authorized." The sequencing of work tasks must be done in such a way that successful completion of earlier tasks is not dependent upon the completion of later tasks.

### Cancellation

MORPC reserves the right to cancel any contract for failure or refusal of performance, fraud, deceit, misrepresentation, collusion, or any other misconduct on the part of the consultant.

### Unresolved Finding for Recovery

The selected consultant affirmatively represents and warrants to MORPC that it is not subject to a finding for recovery under ORC 9.24 or that it has taken appropriate remedial steps required under ORC 9.24 or otherwise qualifies under that section. The consultant agrees that if this representation or warranty is deemed to be false, the agreement shall be void *ab initio* as between the parties to this agreement, and any funds paid by MORPC to the consultant hereunder shall be repaid to MORPC immediately, or an action for recovery may be commenced immediately by MORPC for recovery of said funds.

### Covenants of Consultant

The consultant will be required to covenant and warrant the following:

- a) Consultant is not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any contract, supported in whole or in part by the funding sources for this project;
- b) Consultant has not within a three (3) year period had one or more public transactions terminated for cause or default;

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- c) Consultant will comply with the provisions of Section 1352, Title 31 of the U.S. Code, which prohibits the use of federal funds to lobby any official or employee of any federal agency, or member or employee of Congress; and to disclose any lobbying activities in connection with federal funds.