

REQUEST FOR PROPOSAL/QUALIFICATIONS
FOR BEHAVIORIAL ENERGY SAVINGS PROGRAM

November 21, 2018

DELIVER RESPONSES TO
Attn: EDWIN REVELL, DIRECTOR
CITY OF BIRMINGHAM
DEPARTMENT OF PLANNING ENGINEERING & PERMITS
CITY HALL ROOM 207
710 NORTH 20TH STREET
BIRMINGHAM, ALABAMA 35203

RESPONSE DUE DECEMBER 7, 2018 BY NO LATER THAN 5PM CST

5 HARD COPIES, 5 ELECTRONIC MEDIA, OR VIA EMAIL TO
EDWIN.REVELL@BIRMINGHAMAL.GOV

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1.0 REQUEST FOR PROPOSAL/QUALIFICATIONS OBJECTIVE

- The City of Birmingham invites consultants to provide qualifications for delivering comprehensive energy conservation and management services that utilize energy specialists, engineers and other energy experts to supply on-site and remote services including organizational behavior change, staff training and technology to optimize existing systems, change the energy culture and substantially reduce energy consumption without requiring installation of new HVAC equipment, lighting or EMS controls.

2.0 INSTRUCTIONS TO RESPONDENTS

Minimum Qualifications

Respondents must meet the following minimum qualifications:

- Respondent shall have 10 years or more experience as a firm delivering organizational behavioral energy conservation programs and services that are not dependent upon improvements or installation of energy efficient lighting, HVAC equipment or computerized controls systems.
- Respondent's experience shall include at least 10 verifiable contracts for organizational behavioral energy conservation programs that have generated at least 20% overall savings.
- Respondent's program shall employ an independent, third party Measurement & Verification that adheres to International Performance Measurement and Verification Protocol (IPMVP) guidelines.
- Proposed key personnel shall have verifiable behavioral energy conservation experience with similar clients, and include at least one (1) Professional Engineer and two (2) Association of Energy Engineers (AEE) Certified Energy Managers (CEMs).

3.0 SCHEDULE OF EVENTS

RFP Release	November 21, 2018
Last Day to Submit Written Questions	November 28, 2018 no later than 5PM CST
Deadline for Receipt of Responses	December 7, 2018 no later than 5PM CST
Selection Decision	Week of December 17, 2018
Agreement Award	To Be Determined
Program Initiation	To Be Determined

4.0 SUBMISSION REQUIREMENTS

- Each Offeror must submit the number of copies indicated on the Cover Page of this RFP.
- Respondents using commercial carrier services shall ensure that the RFP Response is addressed and marked on the outermost envelope or wrapper with the RFP Name and Submission Deadline Date and Time, as listed on the Cover Page of this RFP.
- Facsimile Responses, modifications, or withdrawals, will not be considered unless authorized by the Solicitation.
- Offers submitted by e-mail shall be considered only if the e-mail was specifically stipulated or permitted on the Cover Page.

5.0 SUBMISSION FORMAT

- Responses shall be concise. At a minimum, proposal is to include a Table of Contents and the following Sections in the order listed below. **The complete RFP Response, inclusive of all attachments and exhibits, is limited to fifty (50) 8.5"x11" pages.** (Required forms listed in Section 7 of this document are not included in the page count.) Double-sided pages and oversized pages will count as two (2) pages.

Cover Letter: One (1) page Cover Letter introducing the Respondent and Response, signed by an Officer of the Respondent firm. The cover letter shall include a statement confirming Respondent meets the Minimum Criteria set forth in this RFP.

Submission Section 1: Company Background

1.1 Company Overview

Respondent shall provide a description of the entity that would enter an agreement with the City of Birmingham. At a minimum, the description should include the following:

- Company History
- Legal Name
- Company Legal Structure
- Federal Tax ID
- Year Formed
- State of Formation
- # Employees
- Markets
- Primary Contact Person Name, Address, Phone, Email

1.2 Project History

Each proposer shall state whether they have ever defaulted on a project.

1.3 Financial Stability

Respondent shall state whether it, its parent company, or anticipated subcontractors have ever filed for bankruptcy. List all instances.

Submission Section 2: Experience

2.1 Experience Overview

Respondent shall provide an overview of experience with behavioral energy conservation projects. Provide the total number of behavioral energy conservation contracts, as well as the total number of behavioral energy conservation for K-12 school districts, total reported savings from all contracts, and average percent savings for all contracts, measured in compliance with IPMVP guidelines.

2.2 References

Respondent shall list at least twenty (20) current or completed similar contracts with a minimum of 20% overall savings to date. At least five (5) of the projects must be for K-12 clients for behavioral energy conservation. Include the following information, at a minimum:

- Organization Name
- Address

- Program Manager
- Organization Contact
- Title
- Phone
- Email
- Program Start Date
- Savings to Date in Dollars
- Savings Percent to Date
- KBTU per square feet for baseline
- KBTU per square feet for last performance year

Submission Section 3: Key Personnel

3.1 Key Personnel Overview

Respondent shall provide an overview of company leadership and key personnel experience and qualifications. The proposed key personnel shall have verifiable behavioral energy conservation experience with similar clients, and include at least one (1) Professional Engineer and two (2) Association of Energy Engineers (AEE) Certified Energy Managers (CEMs).

3.2 Key Personnel Resumes

Respondent shall provide the following information for bidder personnel as well as all potential subcontractors:

- Describe the expertise of the overall company and key personnel.
- List all relevant licenses.
- Key Personnel resumes/bios shall include the following:
 - Hire Date
 - Education
 - Licenses & Certifications, including but not limited to AAE CEM
 - Relevant Experience
- List whether Respondent uses subcontractors, and detail minimum requirements for subcontractor experience

3.3 Project Team Chart

Respondent shall provide a detailed project team organizational chart.

Submission Section 4: Services

4.1 Program Approach

Respondent shall detail its Program Approach to organizational behavioral energy conservation.

4.2 Implementation Plan

Respondent shall provide a typical Implementation Plan, including the following minimum elements:

- Timeline
- Communications Plan
- Respondent Primary Contact
- Training
- Reporting
- Requested City of Birmingham Responsibilities
- End of Term Options
- Proprietary Technologies (if any)
- Energy Conservation Measurement & Verification Tool(s)

Submission Section 5: Measurement & Verification (M&V) Process

5.1 Energy Accounting Software

Confirm that the M&V Energy Software:

- is an independent third-party company
- adheres to International Performance Measurement and Verification Protocol (IPMVP) guidelines.

5.2 List a sampling of potential Baseline Adjustments

Submission Section 6: Sample Contract

Respondent shall include a sample contract for a behavioral energy savings program based on a five (5) year term.

Submission Section 7: Savings Projection & Program Fees

7.1 Respondent shall provide a preliminary estimate of City of Birmingham's gross and net savings annually for the contract term. Respondent shall detail all fees due from City of Birmingham under the contract included in Section 6. Failure to account for fees included in the sample contract may disqualify the Response.

7.2 Project Risks

Respondent shall identify project risks and plans to mitigate each, including at a minimum:

- Program Adoption & Training
- On-Site Staff Management
- Subcontractor Management & Performance
- Timeline for Return on Investment (ROI)

7.3 Additional Program Benefits

Respondent shall detail additional program benefits.

6.0 CRITERIA FOR SELECTION

- General criteria for selection are listed below. The City of Birmingham reserves the right to reject any and all Responses, to waive minor informalities and/or irregularities in any Response received, and to be the sole judge of the acceptability of Responses. Respondents not meeting the Minimum Qualifications listed in “Section 2.0 INSTRUCTIONS TO RESPONDENTS” will be disqualified.

Criteria	Maximum Points
Projected Net Savings	25
Documented history of at least 20% savings through organizational behavior energy conservation	25
Program and Implementation Plan	20
Company and Key Staff Qualifications	15
Measurement & Verification Methodology	15
Total	100