



SOLICITATION NO.: Request for Proposal (RFP) 92/2023

BUYER: Cale Turner

PHONE NO.: (573) 874-7375

E-MAIL: cale.turner@como.gov

TITLE: Professional Services: Energy & Utility Resource Conservation Program Services

ISSUE DATE: May 16, 2024

RETURN PROPOSALS NO LATER THAN: June 14, 2024 AT 5:00 PM CENTRAL TIME (END DATE)

VENDORS ARE ENCOURAGED TO RESPOND ELECTRONICALLY THROUGH THE CITY'S E-BIDDING WEBSITE BUT MAY RESPOND BY HARD COPY (See Mailing Instructions Below)

MAILING INSTRUCTIONS: Print or type **Solicitation Number** and **End Date** on the lower left hand corner of the envelope or package. Delivered sealed proposals must be in the Purchasing Division office (701 E. Broadway, 5th Floor) by the return proposals date and time.

(U.S. Mail)	or	(Courier Service)
RETURN PROPOSALS TO: CITY OF COLUMBIA PURCHASING		CITY OF COLUMBIA PURCHASING
PO BOX 6015		701 E. BROADWAY, 5 th FLOOR
COLUMBIA MO 65205		COLUMBIA MO 65201

ORIGINAL CONTRACT PERIOD: Date of Award through Project Completion

DELIVER SUPPLIES/SERVICES FOB (Free On Board) DESTINATION TO THE FOLLOWING ADDRESS:

**City of Columbia, Office of Sustainability
Columbia, Missouri**

The offeror hereby declares understanding, agreement and certification of compliance to provide the items and/or services, at the prices quoted, in accordance with all requirements and specifications contained herein. The offeror further agrees that the language of this RFP shall govern in the event of a conflict with their proposals. The offeror further agrees that upon receipt of an authorized purchase order from the Purchasing Division or when a Contract/Agreement is signed and issued by an authorized official of the City of Columbia, a binding contract shall exist between the offeror and the City of Columbia.

SIGNATURE REQUIRED

VENDOR NAME	
MAILING ADDRESS	
CITY, STATE, ZIP CODE	
CONTACT PERSON	EMAIL ADDRESS
PHONE NUMBER	FAX NUMBER
VENDOR TAX FILING TYPE WITH IRS (CHECK ONE) <input type="checkbox"/> Corporation <input type="checkbox"/> Individual <input type="checkbox"/> State/Local Government <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> IRS Tax-Exempt	
AUTHORIZED SIGNATURE	DATE
PRINTED NAME	TITLE

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1. INTRODUCTION AND GENERAL REQUIREMENTS

INTRODUCTION AND PROJECT BACKGROUND:

This document constitutes a request for competitive, sealed proposals for the provision of professional services for energy and utility resource conservation program services for the City of Columbia, Office of Sustainability (hereinafter referred to as City) as set forth herein.

The purpose is to solicit proposals from Energy Service Companies (ESCOs) that have capabilities to identify, design, install, maintain, monitor, and arrange financing of a comprehensive utility conservation program. This program includes the services listed in this RFP pursuant to the provisions of Missouri law.

For the purpose of this RFP, ESCO refers to any entity that is qualified to provide a turnkey utility conservation program that includes the services listed in this RFP and meets the minimum offeror's eligibility requirements. The City intends to select an ESCO and to award a single or multiple contract(s) to perform the Investment Grade Audit (IGA) and Project Proposal phase as described in the Scope of Services for facilities and infrastructure described in Attachment 1. Performance of Construction, Implementation, Commissioning and Financing; and Guarantee/Monitoring phases as described in the Scope of Services would be covered under an amended performance contract.

The City, with a population of approximately 126,000 residents, is seeking the professional services of the most qualified ESCO to support their continued effort to improve city infrastructure in the most efficient manner. The City has identified a number of potential opportunities to investigate with the selected firm as a part of the IGA and Project Proposal process. The selected firm will be focused on providing turnkey, design/build improvements with a guarantee of both performance and savings that meets or exceeds current state statutes.

The City intends to fund these improvements based on the savings that can be found through their construction. The intent is to create a more financially sustainable approach to infrastructure improvement, while improving the overall efficiency of the City's processes, operations, and infrastructure.

ORGANIZATION:

This document, referred to as RFP, is divided into the following parts:

- 1) Introduction and General Information
- 2) Scope of Services
- 3) Proposals Submission Information
- 4) Exhibits A – G
- 5) Attachment 1 – Building Descriptions
- 6) Attachment 2 – Sample Contract

TERMINOLOGY/DEFINITIONS:

Whenever the following words and expressions appear in a RFP document or any addendum thereto, the definition or meaning described below shall apply.

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- Addendum/Amendment means a written, official modification to an RFP.
- Attachment applies to all forms which are included with an RFP to incorporate any informational data or requirements related to the performance requirements and/or specifications.
- Proposals end date and time and similar expressions mean the exact deadline required by the RFP for the receipt of sealed proposals.
- Offeror means the supplier, vendor, person, or organization that responds to an RFP by submitting a proposals with prices to provide the equipment, supplies, and/or services as required in the RFP document.
- Buyer means the procurement staff member of the Purchasing Division. The contact person as referenced herein is usually the buyer.
- Contract means a legal and binding agreement between two or more competent parties, for a consideration for the procurement of equipment, supplies, and/or services.
- ESCO means a supplier, offeror, person, or organization who is a successful offeror as a result of an RFP and who enters into a contract.
- Investment Grade Audit (IGA) will identify potential cost-saving measures, determine the cost and savings of each measure, and present a measurement and verification plan to validate future savings of each measure.
- Project Proposal will present a bundle of measures that can be financed through guaranteed savings over the proposed financing term, including a cash-flow table.
- Performance Contract will define the final agreed upon list of measures, equipment and labor costs and guaranteed cost savings. Through the Performance Contract, the ESCO proceeds to final design, construction, and commissioning of the improvement measures.
- Exhibit applies to forms, which are included with an RFP for the offeror to complete and submit with the sealed proposals prior to the specified end date and time.
- Request for Proposals (RFP) means the solicitation document issued by the Purchasing Division to potential offerors for the purchase of equipment, supplies, and/or services as described in the document. The definition includes all exhibits, attachments, and addendums thereto.
- May means that a certain feature, component, or action is permissible, but not required.
- Must means that a certain feature, component, or action is a mandatory condition.
- Shall have the same meaning, as the word must.
- Should means that a certain feature, component and/or action are desirable but not mandatory.

SCHEDULE OF ACTIVITIES:

DATE	ACTIVITY
March 31, 2024	Close of written <i>Requests for Additional Information</i>
June 4, 2024	Written responses to <i>Requests for Additional Information</i> sent to all
June 14, 2024	Request for Proposals is due at 5:00 p.m. CST
July 2024	Contract Start Date
*The above dates are target dates and are subject to change by the City of Columbia.	

PROPOSALS SUBMISSION:

Proposals may be submitted in a sealed envelope at the purchasing office **or** uploaded electronically on the

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City's E-bidding website. No fax or e-mail proposals will be accepted. Sealed proposals must be delivered to the Finance Department, Purchasing Division, 701 E. Broadway, 5th Floor, Columbia, MO 65201 by the closing date and time. Proposals received after the appointed time will be determined non-responsive and will not be opened. The proposals must be in sealed envelopes and marked in bold letters "RFP 92/2023: PROFESSIONAL SERVICES: ENERGY & UTILITY RESOURCE CONSERVATION PROGRAM SERVICES."

QUESTIONS/CLARIFICATIONS OF THE REQUEST FOR PROPOSALS:

All questions concerning the solicitation and specifications shall be submitted in writing via e-mail or fax to the name below. You are encouraged to submit your questions via e-mail.

Cale Turner, Purchasing Agent
Phone: (573) 874-7375
E-mail: cale.turner@como.gov

Any oral responses to any question shall be unofficial and not binding on the City of Columbia. An Addendum to this RFP providing the City of Columbia's official response will be issued if necessary to all known prospective offerors. Questions must be submitted no later than 5:00 p.m. on March 31, 2024.

This written *Request for Additional Information* will take place of the normal Pre-Proposal Conference.

VALIDITY OF PROPOSALS:

Offerors agree that proposals submitted will remain firm for a period of ninety (90) calendar days after the date specified for the return of proposals.

REJECTION OF PROPOSALS:

The City of Columbia reserves the right to reject any or all proposals received in response to this RFP, or to cancel the RFP if it is in the best interest of the City of Columbia to do so. Failure to furnish all information requested in this RFP may disqualify the proposals. Any exceptions to the requirements specified must be identified in the proposals.

WITHDRAWAL OF PROPOSALS:

Any offeror may withdraw their proposals at any time prior to the scheduled closing time for the receipt of proposals. However, no proposals will be withdrawn for a period of ninety (90) calendar days after the scheduled closing time for the receipt of proposals.

ALTERATION OF SOLICITATION:

The wording of the City of Columbia's solicitation may not be changed or altered in any manner. Offerors taking exception to any clause in whole or in part should do so by listing said exceptions on their letterhead and submitting them with their proposals; such exceptions will be evaluated and accepted or rejected by the City of Columbia, whose decision will be final.

RESPONSE MATERIAL OWNERSHIP:

All material submitted regarding this RFP becomes the property of The City of Columbia. Any person may review proposals after the Agreement has been issued, subject to the terms of this solicitation.

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INCURRING COSTS:

The City of Columbia shall not be obligated or be liable for any cost incurred by offerors prior to issuance of an Agreement. All costs to prepare and submit a response to this solicitation shall be borne by the offeror.

COLLUSION CLAUSE:

Any agreement or collusion among offerors and prospective offerors to illegally restrain freedom of competition by agreement to fix prices, or otherwise, will render the proposals of such offerors void.

CONTRACT DOCUMENTS:

The final agreement between the City of Columbia and the offeror will include by reference:

- Offeror's Response to the RFP
- The City Issued RFP with any addendums

Any changes, additions or modifications hereto will be in writing and signed by the City Manager. No other individual is authorized to modify the agreement in any manner.

FUNDS:

Financial obligations of the City of Columbia payable after the current fiscal year are contingent upon funds for that purpose being appropriated, budgeted, and otherwise made available. In the event funds are not appropriated, any resulting Contract will become null and void, without penalty to the City of Columbia.

MISSOURI LICENSURE AND CERTIFICATE OF AUTHORITY:

If applicable, offeror certifies that it is currently in compliance, and agrees to maintain compliance for the duration of the agreement/contract, with all licensure requirements of the Missouri Board for Architects, Professional Engineers, Professional Land Surveyors and Professional Landscape Architects (hereinafter referred as APEPLSPLA) to practice in Missouri as a professional engineer as provided under Chapter 327 of the Missouri Revised Statutes. To the extent required by Section 327.401 of the Missouri Revised Statutes, offeror understands and agrees that the person personally in charge and supervising the professional engineering services of offeror under the agreement/contract shall be licensed and authorized to practice engineering in Missouri, and the offeror will keep and maintain a valid certificate of authority from APEPLSPLA.

2. SCOPE OF SERVICES

SCOPE OF SERVICES:

ESCO must address all utility and water consumption across city facilities and infrastructure for this conservation program. Additionally, ESCO must provide guidance on upgrades to outdated and obsolete equipment and perform utility-related facility improvements through the program.

ESCO must have the demonstrated capability in engineering and management to provide a broad range of services. Services may include but are not limited to the following:

Investment Grade Audit and Project Proposal Phase

- technical audit to evaluate costs and savings of a variety of energy and water-saving measures
- project proposal including financial analysis
- benchmarking using Energy Star or similar tools
- measurement and verification plan
- commissioning plan
- utility bill data services to capture credits from utility bill errors

Construction/Implementation/Commissioning and Financing Phase

- engineering design
- equipment procurement and purchasing
- construction management
- hazardous waste disposal or recycling
- commissioning
- research, application and use of grants, tax credits and other funding/financing mechanisms

Guarantee/Monitoring Phase

- continuing operations and maintenance for all improvements
- staff training on routine maintenance and operation of systems
- training of occupants
- guarantee of performance and cost savings for the entire term of the contract
- monitoring and verification for measurement and reporting of the performance and savings
- provide for independent review of monitoring & verification (guaranteed savings pay for independent contractor)
- maintaining long-term, high-efficiency performance of buildings

ESCO must have the demonstrated capability to address such components and applications including, but not limited to: interior and exterior lighting, space heating, ventilation, air-conditioning, building envelope, heat recovery, energy and water management systems, environmental system controls, motors, domestic water heating, fuel switching, air distribution systems, utility distribution systems, metering, water and wastewater treatment, street lighting, capital needs assessment, or other energy, water, utility, or infrastructure conservation related improvements or equipment including improvements or equipment related to renewable energy.

The ESCO must provide a major reduction in annual utility consumption, lost revenues, and associated operational costs through the implementation of this utility conservation program. As part of the process, a contract must include provision for monitoring and verification of utility savings and any operational

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savings. If requested, the ESCO shall arrange financing or assist City in procuring the most cost-effective funding for the project.

The term is not-to-exceed fifteen (15) years from the final date of installation per state statute.

The ESCO must structure the program's implementation schedule in a manner to minimize financed capital needs. Multiple project phases must be provided by the selected ESCO.

Buildings/Project Description: The end goal shall be to identify potential improvements, develop an appropriate funding mechanism, implement improvements, and have the ESCO guarantee their performance. All facilities owned, managed or operated by City at any time during the term of the performance contract will be considered for this work. Specific facilities now operated by City are listed in Attachment 1. Additional facilities not yet identified that are under the jurisdiction of the City at any time during the term of the performance contract can be included in the scope of work in a contract amendment.

ESCO shall be qualified working within and compliant to State of Missouri RSMo 8.231.

ESCO must be capable of providing solutions to current and future infrastructure needs and challenges that result in energy, operational, and capital cost savings through a financially backed guarantee of savings.

ESCO must have successfully contracted and completed at least five (5) RSMo 8.231 projects in the last five years. Projects completed by ESCO personnel while working for another company or as a subsidiary to another ESCO are excluded as these do not represent the proposals or experience of the specific firm responding.

3. PROPOSALS SUBMISSION/EVALUATION INFORMATION

SUBMISSION OF PROPOSALS:

On-line Proposals - If a registered offeror is responding electronically through the City of Columbia Bidding System website, the registered offeror should submit completed exhibits, forms, and other information concerning the proposals as an attachment to the electronic proposals. The registered offeror is instructed to review the RFP submission provisions carefully to ensure they are providing all required information.

The exhibits and forms provided herein can be saved into a word processing document, completed by a registered offeror, and then sent as an attachment to the electronic submission. Other information requested or required may be sent as an attachment. Be sure to include the solicitation/bid number, company name, and a contact name on any electronic attachments.

In addition, a registered offeror may submit the exhibits, forms, etc., through mail or courier service. However, any such submission must be received prior to the specified end date and time.

If a registered offeror submits an electronic and hard copy proposals response and if such responses are not identical, the offeror should explain which response is valid. In the absence of an explanation, the City of Columbia shall consider the response which serves its best interest.

Hard Copy Proposals - If the offeror is submitting proposals via the mail or a courier service or is hand delivering the proposal, the offeror should include completed exhibits, forms, and other information concerning the proposals. The offeror is instructed to review the RFP submission provisions carefully to ensure they are providing all required information.

Recycled Products - The City of Columbia recognizes the limited nature of our resources and the leadership role of government agencies in regard to the environment. Accordingly, the offeror is requested to print the proposals double-sided using recycled paper, if possible, and minimize or eliminate the use of non-recyclable materials such as plastic report covers, plastic dividers, vinyl sleeves, and binding. Lengthy proposals may be submitted in a notebook or binder.

The offeror should include three (3) additional copies along with their original proposals. The front cover of the original proposals should be labeled "original" and the front cover of all copies should be labeled "copy". In case of a discrepancy between the original proposals and the copies, the original proposals shall govern.

Open Records - Pursuant to section 610.021, RSMo, the offeror's proposals shall be considered an open record after a contract is executed or all proposals are rejected. At that time, all proposals are scanned into the Purchasing Division imaging system.

The scanned information will be available upon request from the Purchasing Division. Therefore, the offeror is advised not to include any information in the proposals that the offeror does not want to be viewed by the public, including personal identifying information such as social security numbers.

In preparing proposals, the offeror should be mindful of document preparation efforts for scanning purposes and storage capacity that will be required to image the proposals and should

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limit proposals content to items that provide substance, quality of content, and clarity of information.

To facilitate the evaluation process, the offeror is encouraged to organize their proposals into sections that correspond with the individual evaluation categories described herein. The offeror is cautioned that it is the offeror's sole responsibility to submit information related to the evaluation categories and that the City of Columbia is under no obligation to solicit such information if it is not included with the proposals. The offeror's failure to submit such information may cause an adverse impact on the evaluation of the proposals.

The proposals should be page numbered.

The signed page one from the original RFP and all signed addendums should be placed at the beginning of the proposals.

Each section should be titled with each individual evaluation category and all material related to that category should be included therein.

Questions Regarding the RFP – Except as may be otherwise stated herein, the offeror and the offeror's agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all of their questions or comments regarding the RFP, the solicitation process, the evaluation, etc., to the buyer of record indicated on the first page of this RFP. Inappropriate contacts to other personnel are grounds for suspension and/or exclusion from specific procurements. Offerors and their agents who have questions regarding this matter should contact the buyer.

The buyer may be contacted via e-mail or phone as shown on the first page.

Only those questions which necessitate a change to the RFP will be addressed via an addendum to the RFP. Offerors are advised that any questions received less than ten (10) calendar days prior to the RFP opening date may not be addressed.

Joint Venture or Co-Counsel Response – If the proposals is being submitted in conjunction with another entity or law firm (similar to a joint response, joint venture, or co-counsel), there can be only one (1) response submitted in response to the RFP by the entities/firms involved. Therefore, only one (1) entity/firm must be designated as lead and must be designated as the official offeror for purposes of submitting the proposals. Such lead offeror and ESCO, if awarded the contract), must be the only party officially signing and submitting the proposals as well as serving as the official signatory for the joint venture or co-counsel.

COMPETITIVE NEGOTIATION OF PROPOSALS:

The offeror is advised that under the provisions of this Request for Proposal, the Purchasing Division reserves the right to conduct negotiations of the proposals received or to award a contract without negotiations. If such negotiations are conducted, the following conditions shall apply:

Negotiations may be conducted in person, in writing, or by telephone.

Negotiations will only be conducted with potentially acceptable proposals. The Purchasing Division reserves the right to limit negotiations to those proposals which received the highest rankings during the initial evaluation phase. All offerors involved in the negotiation process will be invited to submit a best and final offer if necessary.

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Terms, conditions, prices, methodology, or other features of the offeror’s proposal may be subject to negotiation and subsequent revision. As part of the negotiations, the offeror may be required to submit supporting financial, pricing and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the proposal.

The mandatory requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the Purchasing Division determines that a change in such requirements is in the best interest of the City of Columbia.

EVALUATION AND AWARD PROCESS:

It is the purpose of this RFP to obtain data as complete as possible from each offeror that will enable the City of Columbia to determine which prospective offeror is best able to identify, design, install, maintain, monitor, and arrange financing of a comprehensive utility conservation program. After determining that a proposal satisfies the mandatory requirements stated in the Request for Proposal, the evaluator(s) shall use a subjective judgment in conducting a comparative assessment of the proposal in accordance with the evaluation criteria stated below. The contract shall be awarded to the best proposal(s).

Evaluation Criteria Scoring Category	Maximum Points
Offeror’s Experience, Reliability, Expertise of Personnel,	50 points
Method of Performance	50 points
TOTAL	100 points

After an initial screening process, a question and answer conference or interview may be conducted with the offeror, if deemed necessary by the evaluation committee. In addition, the offeror may be asked to make an oral presentation of their proposal during the conference. Attendance cost at the conference shall be at the offeror's expense. All arrangements and scheduling shall be coordinated by the Purchasing Division.

EVALUATION OF OFFEROR’S EXPERIENCE, RELIABILITY, EXPERTISE, AND METHOD OF PERFORMANCE:

Experience and reliability of the offeror and expertise of the offeror’s personnel will be considered subjectively in the evaluation process. Therefore, the offeror is advised to submit information concerning the offeror’s organization, information documenting the offeror’s experience in past performances related to the requirements of this RFP, and information documenting the qualifications of the personnel proposed by the offeror to perform the requirements of this RFP. If the offeror is proposing an entity other than the offeror to perform the required services, the offeror should also submit the information requested for such proposed subcontractor.

Offeror Information - The offeror should provide information about the offeror’s organization on Exhibit A.

Experience - The offeror should provide information related to previous and current services/contracts of the offeror or any proposed subcontractor where performance was similar to the required services of this RFP. The information may be shown on Exhibit B or in a similar manner.

As part of the evaluation process, the City of Columbia may contact the offeror’s references, including references not listed or identified within the offeror’s proposal but who have current or previous experiences with the offeror.

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The offeror shall agree and understand that the City of Columbia is not obligated to contact the offeror's references.

Personnel Expertise - The offeror should provide the information requested on Exhibit C for each key person proposed to provide the services required herein. The offeror may also submit resumes for such key personnel.

The information should identify any relevant qualifications and experience of the person in performing services similar to the services required herein.

Personnel Qualifications - If personnel are not yet hired, the offeror should provide detailed descriptions of the required employment qualifications; and detailed job descriptions of the position to be filled, including the type of person proposed to be hired.

Licenses - The offeror should submit a copy of all licenses and/or certifications, related to the performance of the services required herein that are held by the personnel proposed to provide such services. If not submitted with the proposal, the City of Columbia reserves the right to request and obtain a copy of any license or certification required to perform the defined services prior to contract award.

Proposals will be subjectively evaluated based on the offeror's plan for performing the requirements of the RFP. Exhibit D and G are provided for the offeror's use in providing information about the proposed method of performance and previous sample work. This evaluation shall include evaluation of associated best value/costs for providing services.

MISCELLANEOUS SUBMITTAL INFORMATION:

Affidavit of Work Authorization and Documentation - Pursuant to section 285.530, RSMo, if the offeror meets the section 285.525, RSMo, definition of a "business entity" (<http://www.moga.mo.gov/statutes/C200-299/2850000525.HTM>), the offeror must affirm the offeror's enrollment and participation in the E-Verify federal work authorization program with respect to the employees hired after enrollment in the program who are proposed to work in connection with the services requested herein. The offeror should complete Exhibit E, Business Entity Certification, Enrollment Documentation, and Affidavit of Work Authorization. Exhibit E must be submitted prior to an award of a contract.

The offeror should complete and submit Exhibit F, Miscellaneous Information.

Business Compliance - The offeror must be in compliance with the laws regarding conducting business in the City of Columbia. The offeror certifies by signing the signature page of this original document and any addendum signature page(s) that the offeror and any proposed subcontractors either are presently in compliance with such laws or shall be in compliance with such laws prior to any resulting contract award. The offeror shall provide documentation of compliance upon request by the Purchasing Division. The compliance to conduct business in the state shall include, but not necessarily be limited to:

- Registration of business name (if applicable) with the Secretary of State at <http://sos.mo.gov/business/startBusiness.asp>
- Certificate of authority to transact business/certificate of good standing (if applicable)
- Taxes (e.g., city/county/state/federal)
- State and local certifications (e.g., professions/occupations/activities)
- Licenses and permits (e.g., city/county license, sales permits)

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Insurance (e.g., worker's compensation/unemployment compensation)

The City of Columbia reserves the right to reject any or all proposals, to negotiate with any offeror considered qualified, or to make an award without further discussion.

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EXHIBIT A

OFFEROR INFORMATION

The offeror should provide the following information about the offeror's organization:

Describe the nature of the vendor's business, type of services performed, etc. Identify the vendor's website address, if any.

Provide a list of and a short summary of information regarding the vendor's current contracts/clients.

List, identify, and provide reasons for each contract/client gained and lost in the past two (2) years.

Please provide a brief history of your firm and number of years in the ESCO business.

Describe your firm's in-house resources and expertise in the areas described above, as this will be considered a strong point for leveraging best practices and for ensuring a single point of accountability.

Provide a description of the offeror's business unit dedicated to implementing Energy Savings Performance Contracting projects.

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EXHIBIT B

CURRENT/PRIOR EXPERIENCE

The offeror should copy and complete this form documenting any subcontractor’s current/prior experience considered relevant to the services required herein. In addition, the offeror is advised that if the contact person listed for verification of services is unable to be reached during the evaluation, the listed experience may not be considered.

Offeror Name or Subcontractor Name: _____	
Reference Information (Current/Prior Services Performed For :)	
Name of Reference Company/Client:	
Address of Reference Company/Client:	
Reference Contact Person Name, Phone #, and E-mail Address:	
Title/Name of Service/Contract	
Dates of Project Initiation and Project Completion:	
If service/contract has terminated, specify reason:	
Description of Services Performed, such as: <ul style="list-style-type: none"> ✓ What the subcontractor did ✓ How the subcontractor did it ✓ Results ✓ Additional Detail 	
Subcontractor personnel Assigned to Service/Contract (include all key personnel and identify role):	

Please describe you firm’s approach to pricing an Investment Grade Audit for the City and how it is handled if the City decides it is not in the best interest to move forward once the audit is complete

Project Experience Summary: The offeror should copy and complete the form below and provide a project experience summary for five (5) energy savings performance contracts implemented with municipalities.

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Project Data and References							
Project Name							
Facility Type and Use							
Project Size: -Number of Buildings -Total Square Footage							
Types of Measures							
Project Cost: Installed Project Costs							
Project Cost: Financed Amount							
Guaranteed Annual Savings (\$)							
Financing/Funding Source							
Project Schedule: -Construction Start and End Dates -Guarantee Period Start and End Dates Describe if project was completed on schedule or delayed							
Measurement and Verification Methods							
Project Personnel: List all ESCO personnel associated with this project (limit to those who may be assigned to a project) and their roles and responsibilities (only list those who may be assigned to a project).							
Contact Information: Current phone and email address of owner representatives you worked with.							
Commodity	Units	Guaranteed Annual Savings	Achieved Savings Year 1	Achieved Savings Year 2	Achieved Savings Year 3	Achieved Savings Year 4	Achieved Savings Year 5
Electricity	kWh						
Electric Demand	kW						
Natural Gas	Therms						
Fuel Oil	Gal						
Steam							
Fuel Oil	Gal						
Water							
Other							
Material	\$						
Maintenance	\$						
Contracts							
Other	\$						
TOTAL							

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EXHIBIT B, Continued

In addition to the references above, please provide an example of a project where a savings guarantee was not met and the steps taken by the ESCO. If no shortfall has taken place within the history of the ESCO, please provide a written statement signed by an officer of the company stating that no shortfall has taken place.

All project experience summaries must be for the “responding ESCO” operating under its existing name or subsidiary and must be for the “responding ESCO” as a firm. Project experience summaries will be for the firm as a whole, not for an individual.

EXHIBIT C

EXPERTISE OF KEY PERSONNEL

(Copy and complete this table for each key person proposed)

Title of Position: _____	
Name of Person:	
Educational Degree (s): include college or university, major, and dates	
License(s)/Certification(s), #(s), expiration date(s), if applicable:	
Specialized Training Completed.	
# of years' experience in area of service proposed to provide:	
Describe person's relationship to offeror. If employee, # of years. If subcontractor, describe other/past working relationships	
Describe this person's responsibilities over the past 12 months.	
Previous employer(s), positions, and Dates	

Staffing Methodology

Describe the person's planned duties/role proposed herein:	
--	--

EXHIBIT D

WORK TO BE PERFORMED

The offeror should use this Exhibit, or any format desired, to present a written plan for performing the requirements specified in this Request for Proposals.

Describe your firm's methodology of developing and implementing comprehensive energy efficiency and conservation programs and projects for the City. Address in detail the following key components, if provided by your firm or team, and how you would approach each one:

- Facility and infrastructure surveys
- Energy modeling and analysis
- Project development
- Non-construction related energy conservation strategies
- Engineering and design
- Subcontractor bidding and selection process
- Construction and project management
- Commissioning
- Training
- Safety and quality program
- Measurement and verification of results
- Guarantee of savings
- Ongoing capital planning and asset management

Best Value/Cost: Describe how the ESCO provides the greatest value for the investment made by the City. Provide cost factors to provide the required service. For example cost per square foot of evaluated facility, number of meters in utility system, price per kilowatt hour of renewable energy system, etc.

List the complete range of energy/utility services and capabilities the ESCO offers: such as building/facility energy analysis, engineering, design, installation, water/wastewater treatment equipment analysis, utility metering, commissioning, monitoring and performance verification, and related training.

Provide examples of customers who have completed a performance contract to the end of the term performance guarantee and give results on actual dollar savings achieved.

Describe your willingness to include other manufacturers' products.

- Identify and describe any business associations with equipment manufacturers or suppliers that might be specified for this project.
- Provide five (5) project examples where you have installed or integrated other manufacturers' products.

Provide the location(s) where this project will be managed and ESCO's division headquarters.

Offeror's should identify their experience and proposals to perform analysis, design engineering, preparation of engineering plans and specifications, installation, commissioning, monitoring and verification of savings, and management of a major utility conservation project that has involved Energy

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EXHIBIT D, Continued

Conservation Measures (ECM) and Facility Improvement Measures (FIM) which address facility components and utility infrastructure applications.

The offeror should provide a description of the ESCO's proposals and experience related to training facility occupants and maintenance workers in energy and water conservation awareness.

EXHIBIT E

NOTICE TO OFFERORS

Sections 285.525 To 285.550 RSMo.

Pursuant to section 285.530 (1) RSMo., No business entity or employer shall knowingly employ, hire for employment, or continue to employ an unauthorized alien to perform work within the State of Missouri.

As a condition for the award of any contract or grant in excess of five thousand dollars by the state or by any political subdivision of the state to a business entity, or for any business entity receiving a state-administered or subsidized tax credit, tax abatement, or loan from the state, the business entity shall, by sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services. Every such business entity shall sign an affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection with the contracted services. {RSMo 285.530 (2)}

An Employer may enroll and participate in a federal work authorization program and shall verify the employment eligibility of every employee in the employer's hire whose employment commences after the employer enrolls in a federal work authorization program. **The E-verify system issues a Memorandum of Understanding once enrollment is complete; the City of Columbia requires a copy of this document be attached to the Work Authorization Affidavit.** The employer shall retain a copy of the dated verification report received from the federal government. Any business entity that participates in such program shall have an affirmative defense that such business entity has not violated subsection 1 of this section. {RSMo 285.530 (4)}

For offerors that are not already enrolled and participating in a federal work authorization program, E-Verify is an example of this type of program. Information regarding E-Verify is available at:
<http://www.dhs.gov/e-verify>

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EXHIBIT F

MISCELLANEOUS INFORMATION

Employee/Conflict of Interest:

Offerors who are elected or appointed officials or employees of the City of Columbia or any political subdivision thereof, serving in an executive or administrative capacity, must comply with sections 105.450 to 105.458, RSMo, regarding conflict of interest. If the offeror or any owner of the offeror’s organization is currently an elected or appointed official or an employee of the City of Columbia or any political subdivision thereof, please provide the following information:	
Name and title of elected or appointed official or employee of the City of Columbia or any political subdivision thereof:	
If employee of the City of Columbia or political subdivision thereof, provide name of City or political subdivision where employed:	
Percentage of ownership interest in offeror’s organization held by elected or appointed official or employee of the City of Columbia or political subdivision thereof:	_____ %

Registration of Business Name (if applicable) with the Missouri Secretary of State

The offeror should indicate the offeror’s charter number and company name with the Missouri Secretary of State. Additionally, the offeror should provide proof of the offeror’s good standing status with the Missouri Secretary of State. If the offeror is exempt from registering with the Missouri Secretary of State pursuant to section 351.572, RSMo., identify the specific section of 351.572 RSMo., which supports the exemption.

<i>Charter Number (if applicable)</i>	<i>Company Name</i>
If exempt from registering with the Missouri Secretary of State pursuant to section 351.572 RSMo., identify the section of 351.572 to support the exemption:	

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EXHIBIT G

SAMPLE WORK

The offeror should provide a *sample* Investment Grade Energy Audit including energy savings data.