



Town of Westerly/Westerly Public Schools

Addendum 2

REQUEST FOR PROPOSAL

2016-039

ENERGY CONSULTING SERVICES

April 2016

RFP 2016-039 ENERGY CONSULTING SERVICES ADDENDUM 2

Questions/Clarifications

Sealed proposals are due no later than 3:00 pm on May 23, 2016

Deliver to:

Eileen Cardillo/Purchasing Agent

Westerly Town Hall

45 Broad St.

Westerly, RI 02891

1. The RFP, in the Introduction on page one, references the RI Department of Development Services as being a party to this solicitation. What is and will be their role?

The RFP is referencing the Town Department of Development Services. The State does not have a Department of Development Services. The Town department is responsible for energy-related projects and services and would be the lead on any projects associated with the successful consultant.

2. The RFP indicates a major responsibility of a selected vendor will be to "assist in the development of a Strategic Energy Plan" [page 4] for Westerly and requests a lump sum price for completion of this Plan. There is little additional information provided about the desired scope of the Plan (e.g. supply planning, energy efficiency, renewables), whether it's development will involve a public participation process, which Town department will be primarily responsible for working with the vendor, and what the deliverable is to look like. Please provide additional detail for what is envisioned.

A final Strategic Energy Plan will provide the Town with a benchmark of current energy uses; analysis of success for recent energy performance contract; description and detail of current and continuing inefficient uses of buildings and fleet; recommendations for improvements and/or further energy efficiency measures and/or projects; a short, medium, and long term capital or project plan for the Town; and an analysis of the potential impacts/effects of recommended improvements/projects. At least one public input session would be requested on what the residents support for town-initiated projects. As stated in Question 1, the Department of Development Services would be primarily responsible for working with the successful bidder.

3. Please provide a list of buildings, building age, and size that will be covered by this work with the annual energy consumption of electricity and other fuels for each.

The age and size of each building can be found on the Town's website on Vision Appraisal. Year 1 of the Town's ESCO contract is attached to show some of the requested information. The remainder of the information will be provided with the selected contractor(s) for the during the planning phase. The baseline spreadsheet for the Town buildings is attached.

Town Hall (Broad Street)

Public Works (Larry Hirsch Lane)

Police Department (Airport Road)

Utilities/Engineering (White Rock Road)

Elementary Schools (4)

Bradford

State Street

Dunns Corner
Springbrook
Middle School
High School
Babcock Hall (school administration)
Tower Street Building (recreation & schools)
Old Town Garage (Beach Street)
Senior Center (State Street)
Old Police Station (Union Street) – used as an adult day care

4. The RFP references under Scope of Services, that the successful bidder will "review RFPs, review respondents and assist in the evaluation process, and assist...with negotiating and developing a contract with the the successful bidder" [page 4]. What types of services does Westerly anticipate purchasing through these RFPs?

Currently, the Town has issued and received bids for virtual net metering. The Town will be issuing RFP's for municipal street light conversion as well as an operations and maintenance contract. There will be further RFPs for roof-mounted solar on municipal and school buildings. Also, the Town anticipates another energy performance contract in the near future.

5. Under Scope of Services, the RFP says the successful bidder will "advise as to the most advantageous time to enter into supply contracts." What is the extent of the role that Westerly envisions for the bidder with respect to energy supply? Is the Town seeking a broker to secure energy on the Town's behalf?

The Town's current intention is to use the successful bidder in a consultative role to assist the Town in choosing the right time to purchase energy-related goods and services.

6. The RFP identifies five (5) of seven service categories on page 4. Are there additional categories?

This was an error. There are only five service categories.

7. For Energy Research and Analysis Services, are there specific research topics that are Westerly is particularly interested in and seeking expertise for?

Generally, the Town is interested in bidders who can provide objective advice and analysis to staff based on the submissions of bids from vendors for select requests for proposals. The expert analysis will be determined by the nature of the interest of the Town.

8. For Clean Energy Systems and Technology Analysis and Research, are there particular systems and technologies that Westerly hopes to pursue and implement?

Yes. Solar, hydraulic, gas-based (e.g. methane), geo-thermal, and wind.

9. How many printed copies of proposals does Westerly want to receive? Are electronic submissions acceptable?

The proposals must be submitted as hard copies in sealed envelopes. Three (3) printed copies are required.

10. The RFP makes a number of mentions of References. How many references are required and should they be public sector references similar in size and scope to Westerly?

The Town would like to see relevant and recently-served references. Preferences will be given to vendors who have worked with municipalities in the region, those with coastal community experience (or those communities with similar natural resources), and those with projects similar to those requested in this request.

11. RE: Compensation Structure / Pricing, the RFP states that "compensation will be project based" [page 12]. What does this mean?

The consultant will be an "on-call" consultant and be utilized on a project basis. Please see the section on "Labor Rates" for guidance on hourly rates.

12. Under Cost Tables, it says that "awarded vendors are required to provide specific and transparent prices in all responses to bid quotation requests" and implies that bids will be solicited for each project. It then references "awarded RFQ vendors and says they can negotiate project rates as part of the bid process. Please explain what is envisioned here and what the Cost Tables are that are referenced.

Please see the answer to 11 and 13. This references future bids that the Town will work with the successful vendor(s) to work on the Town's behalf as an owner's agent or consultant. The Town will work with the success vendor(s) to determine their cost for such projects.

13. Should bidders submit hourly rates? Will compensation be project based? Will project based compensation be fixed fee, not-to-exceed, or actual time?

Hourly rates for general consultative work. Negotiated fixed-project compensation can be negotiated with the successful vendor(s) per project. Most projects will be a not-to-exceed, but depending on the nature of the project and the negotiation between the Town and the successful vendor(s), other compensatory arrangements can be acceptable, including fixed-fee and actual cost.

14. Please confirm that bidders should submit "lump sum total for the Strategic Energy Plan."

Based on the information provided in Question 2, please provide a lump sum cost. If the responding vendor wishes to add to or cannot provide all the services requested in the Question 2 response, please note those difference and adjust the lump sum cost accordingly.

15. Page 1 of the RFP references a previous ESCO contract which resulted in implementation. What was the success of this project? What elements of this project, if any, would the town like to see repeated or altered for any and all subsequent future projects of a similar nature i.e. those outlined in this RFP? Do the energy efficiency measures have to be funded by an ESCO or are there other methods of performing this type of work, such as a Town managed revolving green fund?

Please refer to the attached Year 1 summary from the current ESCO contract. The Town will work with the selected contractor to determine what should be repeated or altered for future projects. Not all energy efficiency measures have to be funded by an ESCO. The RI Infrastructure Bank loan will be one avenue and other ideas will be discussed in the planning process.

16. On page 1 of the RFP, there is mention of a successful application to the RI Infrastructure Bank to implement an array of efficiency measures. What is the status of this project? Is it in development, will it be implemented? Is implementation solely or partially dependent on the development of the Strategic Energy Plan detailed in this RFP?

This application was successful. The Town is working on bids for the projects and anticipates closing on the loan at the end of June. It is a requirement of the funding to have a Strategic Energy Plan within six months of closing.

17. On page 1 of the RFP, there is reference to requests for qualifications being sent out for virtual net metering. Is the Town looking to purchase solar energy through a project on land somewhere else in the state of RI? Or is the Town interested in developing its own solar project that could be virtually net metered? What is the status of this project? Will the evaluation of bidders and assistance in consulting related to the award of a contractor for this project be part of the scope of services desired from the award of this RFP?

The Town has received the bids for virtual net metering. The selected consultant will work with the Town to review these bids. The request for qualifications for this bid outlined what the Town was looking for in this project.

18. What is the estimated annually volume for electricity and natural gas (and/or oil/propane/etc. as applicable) for the Town of Westerly/Westerly Public Schools? Are there presently any benchmarks in place for a desired reduction percentage of annually volume in an effort to reduce costs and carbon footprint?

Benchmarks will be developed through the Strategic Energy Plan process. The Town's baseline spreadsheet is attached as compiled by the University of Rhode Island in partnership with the Office of Energy Resources. A snapshot spreadsheet of gas usage is also attached.

19. Can the selected vendor for this contract design and build projects identified under this consulting contract? Or will those services or projects be bid separately?

It is intended that this consultant will be able to provide all necessary oversight to our energy program which may include design, however, the build of any energy project would be bid separately.

20. Will SEP address both the Town and the School District buildings? If so, will the Town and the School District share one unified plan or do the plans for the Town and School District need to be distinct?

The Strategic Energy Plan is for the Town buildings. The School District may choose to do a plan in the future with the selected consultant. This would be tasked at a future date.

21. Has the Town already committed to specific long term energy goals or will developing such goals be part of the SEP process?

This will be part of the process.

22. What level of prior energy documentation will be available to the SEP team? E.g., past energy audits or retro-commissioning studies of major Town or School District buildings, past studies of the Town or School District's overall energy or carbon footprint, etc.

The Town will make available all documentation it has. We have done one energy audit.

23. Is the SEP intended to address energy procurement in addition to energy consumption?

Yes.

24. Is the SEP intended to address the potential for renewable or other on-site energy generation?

Yes.

25. Please clarify what the Town is looking for in the pricing submission. The RFP indicates that successful bidders will negotiate fees based on specific projects that come up during the term. Are we correct to assume that the RFP is not seeking pricing for the 5 listed service categories?

Hourly rates for general consultative work. Negotiated fixed-project compensation can be negotiated with the successful vendor(s) per project. Most projects will be a not-to-exceed, but depending on the nature of the project and the negotiation between the Town and the successful vendor(s), other compensatory arrangements can be acceptable, including fixed-fee and actual cost.

26. A "Strategic Energy Plan" is mentioned under 3. *Specifications*. A street lighting project and ESCO contract and a solar project are also listed in the background information. However, the Plan and these other specific projects are not mentioned under any of the requested service categories. Are the Plan and

these other projects standalone scopes that the town will select a vendor to perform via this RFP? What should be included under the lump sum fee category?

The listed projects are projects that the Town already has underway and anticipates the immediate need for this selected consultant(s). These are stand-alone scopes that the Town will seek not-to-exceed fees per project. The lump sum fee category is ONLY for the Strategic Energy Plan.

27. Does selection in a category qualify CES for all DoDS members or only for the Town of Westerly? The selected consultant(s) will be able to do any energy related project that the Town tasks them with after the award.

28. How many kWhs of electricity and MMBtus of natural gas does the town consume each year? See attached documents.

29. Is the town interested in hiring a firm to manage the competitive procurement of electricity and natural gas? This may be a future project as the Town's current contract with Direct Energy expires at the end of the calendar year 2016.

30. In the RFP's appendix A, the town references bid surety, performance bonds, and ARRA supplemental terms and conditions; however, it is not clear if this opportunity is subject to any of those three items. Can you please confirm which if any are? This is part of our standard terms and conditions; does not apply to consulting services in this RFP.

31. The RFP refers to an ESCO contract several years ago; can the town provide further information on the extent of services performed under that contract and whether or not the town is still engaged with that contractor? See attached. The Town is still paying for the maintenance portion of the ESCO.

32. Is an electronic response acceptable or do you require hard copies? The proposals must be submitted as hard copies in sealed envelopes. Three (3) printed copies are required.

33. Are there any other measurable sustainability goals that the Town has in mind? For example – ways to incorporate savings into the school system/curriculum / ways to incorporate the design/construction/etc. into opportunities for classes in the district? Are there any goals beyond limiting CO2 footprint such as local food/sustainability/etc.?

This will be discussed and determined during the completion of the Strategic Energy Plan.

34. Is there any existing framework for the team who will be responsible for writing and implementing the Strategic Energy Plan? Will this consist of a board of several people? 2-3 or so members? Has the Town of Westerly determined which individuals and from which respective departments this team will consist of on their end?

The Department of Development Services will oversee this process. At this time, the rest has not been determined. It is anticipated that at least one individual from public works will be involved in the project.

35. Under Energy Research and Analysis Services on page 5 of the RFP, "staffing research and analysis" is listed. Could the Town please clarify? Is this pertaining to any current staff employed by the Town and or School Dept.? Is this in reference to any contractors/vendors who would be selected to implement any of the specified programs outlined in this RFP? Is this in reference to the firm responding to this RFP?

This was included to ensure that the Town can utilize this consultant for any energy related project. The Town, at this time, does not have a full-time person dedicated to these projects and if it becomes a recommendation through the planning process or the magnitude of projects the selected consultant may be asked to assist in validating this.

36. Is the referenced required Appendix A all of pages 17-21 of the RFP packet?

Yes

37. Is Appendix A intended to be a general certification form for subsequent contractors in reference to any services they would perform as outlined in this RFP, or is this specifically speaking to the consultants responding to this specific RFP proposal?

Specific to this RFP

38. What is the “Bid/RFP/RFQ number” referenced in Appendix A?

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39. What is the “date/time” of opening that is requested to be marked on the upper left hand of the submitted envelope?

May 23, 2016 3:00 PM

40. Appendix A states “each bid/offer should be submitted in separate sealed envelopes” – could you please clarify? Is this in reference to vendors submitting multiple bids? Is this in reference to the cost proposal being in a separate sealed envelope?

The cost proposal must be submitted in a separate sealed envelope.

41. How many copies of this RFP response are desired? If more than one, should these all be in their own separate sealed envelopes, or enclosed in the same one?

Three (3) copies; only the cost proposal must be in its own separate sealed envelope.

42. What is the “offer package” that must be signed in ink? Is this the cost proposal? The response itself? Both? Where should this/these be signed?

The bidder certification form, Appendix A, last page requires a signature and should be signed in ink. If applicable, any document that requires a signature.

43. Appendix A states “bids must be submitted on the bid solicitation forms provided.” Which forms is this in reference to? This section also asked for “indicated brand and part numbers of items offered” – could you please clarify what the Town is asking for with this request? This section also requests “detailed cuts and specs on items offered as equivalent to brands requested WITH THE OFFER.” Can you please explain what the Town is requesting with this requirement? Is this section referring to contractors of specific facility-related projects?

If there is a proposal page in the document you would be required to submit that document; please submit the completed Appendix A from the document.

44. Is “DELIVERY and PRODUCT QUALITY” in Appendix A in reference to contractors performing services for the Town, or meant to be applied to respondents of this specific RFP requesting consulting services?

This is part of our standard terms and conditions; does not apply to consulting services in this RFP.

45. Is “PREVAILING WAGE, OSHA SAFETY TRAINING and APPRENTICESHIP REQUIREMENTS” in Appendix A in reference to contractors performing services for the Town, or meant to be applied to respondents of this specific RFP requesting consulting services?

This is part of our standard terms and conditions; does not apply to consulting services in this RFP.

46. In general, is the Town interested in having all of the needs outlined in this RFP met by one firm, or, is the goal of this RFP to find a firm who is capable of consulting the Town to find the most qualified and capable contractors to perform each of the outlined tasks, while assisting in implementing and overseeing the proposed Strategic Energy Plan?

The Town reserves the right to qualify more than one consultant if it is in the best interest of the Town.

47. For each service category we bid on, are we only required to write a 250 word summary? Or do we have to respond to each of the Required/Preferred Bidder Qualifications for each service category, in addition to elaborating on experience, services, etc. in our general proposal?

For each service category it is a 250 word summary. In addition, everything under Mandatory Requirements and Requested Information explains the page limits for your general proposal.

48. How should we format our RFP response? According to page 9 and page 14, it looks like there should be 5 major categories: Services, Organization Profile, Experience, Relationship Management, References. Then there are several other categories listed (Company Certification, Business Background, Years of Experience, etc.) – should those also have their own headings, or can they be included in other sections? This is very confusing!

It is up to the vendor how you respond to the RFP. The Mandatory Requirements and Requested Information on Page 9 outline what must be in the proposal. In addition, you have 250 word summaries for the service categories that you are interested in responding to. This is the “Service Categories information” on page 9.

49. Is there a page limit? Only some of the sections specify number of pages.

There is no overall page limit. The only page limits are indicated on page 9.

50. Are we required to submit an RIVIP Bidder Certification Cover Form?

No