

**TOWN OF TRUMBULL
REQUEST FOR QUALIFICATIONS/PROPOSAL
ENERGY EFFICIENCY CONSULTING SERVICES**

RFQ/P #6167

DUE: MARCH 10, 2016 @ 2:00 P.M.

GENERAL INFORMATION

The Town of Trumbull (herein after referred to as "Town" or "Owner") invites interested and qualified professional firms to submit proposals for consulting services to develop a performance based energy savings operation plan for various Town of Trumbull facilities including all of Board of Education facilities. The words "Firm", "Responder" or "Consultant" are used interchangeably in this document to individuals and/or firms that may submit formal responses to this request. The proposals shall be in accordance with the requirements and specifications contained herein.

Responses to this RFQ/P shall be submitted to the Purchasing Agent at the date and time noted above and using the Proposal Form contained herein. No oral, telephonic, emailed, or faxed responses shall be considered. No oral, telephonic, emailed, or faxed corrections, deletions, or additions to any response shall be accepted. The Town reserves the right to reject any or all responses, and to waive any or all formalities in connection with this request. Any responses received after the above scheduled due date and time shall not be accepted or opened.

Please be advised that the person signing the formal proposal must be authorized by your organization to contractually bind your firm with regard to prices and related contractual obligations. ALL forms contained in this request are required for submittal MUST be completed in their entirety; failure to do so may result in disqualification of a firm's proposal.

1. PROPOSAL TIME AND SUBMISSION

- a) Proposals shall be received at the office of the Purchasing Agent, Town Hall, prior to the advertised hour of opening.
- b) A firm may withdraw a proposal at any time prior to the above scheduled date and time. Any proposal received after the above scheduled date and time shall not be considered or opened.
- c) Three (3) complete sets – 1 original and 2 copies of the proposal (responses) are to be submitted in a sealed envelope to the Purchasing Agent and clearly labeled and addressed as follows:

TOWN OF TRUMBULL
ENERGY EFFICIENCY CONSULTING SERVICES
RFQ/P 6167 DUE March 10, 2016 2pm
Kevin J Bova, Purchasing Agent
Town of Trumbull – Purchasing Department
5866 Main Street, Trumbull, CT 06611

N.B. SUBMIT THE PRICING PROPOSAL IN A SEPARATE SEALED ENVELOPE

2. TOWN OPTIONS

- a) The Town reserves the right to reject any or all bids and to waive any requirements, irregularities, technical defects or service therein when it is deemed to be in the best interest of the Town.
- b) The Town shall be under no obligation to accept the lowest financial proposal if it is deemed in the best interest of the Town to do so.
- c) If a responder's qualifications and proposal do not meet or better the required specifications on all points that must be outlined in a letter otherwise it will be presumed that a proposal is in accordance with the required specifications.

- d) The Town reserves the exclusive right to determine whether or not qualifications and a proposal meet or exceeds the stated specifications.

3. **TAXES**

All purchases made by the Town, and associated with the award of this requirement shall be tax exempt. Any taxes must not be included in bid prices. A Town Tax Exemption Certificate shall be furnished upon request.

4. **INQUIRIES**

- a) All inquiries regarding this request must be submitted in writing to the following (faxed or emailed questions are acceptable) and shall be answered up to the close of business on **March 3rd, 2016**, after which time no additional questions will be accepted.
- b) To ensure consistent interpretation of certain items, answers to questions the Town deems to be in the interest of all bidders will be made available in writing or by Fax as appropriate to all bidders.
- c) Inquiries of a technical nature may be directed to Mr. Mark Deming (203.452.4306).
- d) All other inquiries may be directed to Kevin J Bova Purchasing Agent (203.452.5042) kbova@trumbull-ct.gov.
- e) Additionally, after inquiries are received, the Town reserves the right to communicate with any or all of the bidders to clarify the provisions of Proposals.
- f) **It is the sole responsibility of the responding firm to verify any addendums that may have been issued relating to this request prior to submission of a proposal. Any notice of addendum shall be published on the Town website www.trumbull-ct.gov (Purchasing Department). Failure to submit a bid or proposal that does not address any changes or addendums may result in a disqualification of a bid submission.**

5. **AWARD AND AUTHORITY**

- a) The requested services shall be awarded to the consultant whose proposal is deemed to best provide the services desired, taking into account the requirements, terms and conditions contained in the request for proposals and the criteria for evaluating proposals.
- b) The Town Purchasing Agent will issue notification of award in writing.

6. **PRICING**

All prices quoted are to be firm for a period of one hundred and twenty (120) days following opening. Special Consideration will be given to responses with extended firm price dates. The Town is always interested in any and all cost reduction opportunities.

7. **ASSIGNMENT OF RIGHTS, TITLES, AND INTERESTS**

Any assignment or subcontracting for work to be performed related to this request, in whole or in part, and any other interest in conjunction with Town procurement shall not be permitted without the express written consent of the Town of Trumbull.

8. **HOLD HARMLESS CLAUSE**

The consultant agrees to indemnify, hold harmless and defend the Town from and against any and all liability for loss, damage or expense which the Town may suffer or for which the Town may be held liable by reason of injury, including death, to any person or damage to any property arising out of or in any manner connected with the operations to be performed under an agreement with the Town, whether or not due in whole or in part of any act, omission or negligence of the Town or any of his representatives or employees.

9. **CONFLICT OF INTEREST**

Public officials shall be prohibited from receiving any town work procured through a Public Bid or bid Waived process so as to avoid any appearance of impropriety or Conflict of interest; and; Public Officials cannot circumvent the intent of this Ordinance by receiving town work through a bid waiver, As proscribed by The Trumbull Town Charter.

10. **AVAILABILITY OF FUNDS**

Any contract award associated with this RFQ/P is contingent upon the availability of funds to Town. In the event that funds are not available, any agreement resulting from this RFQ/P shall become void.

11. **AGREEMENT**

a) The specifications of the proposal received from the selected firm and the purchase order issued to the consultant shall serve as the agreement.

b) The Town reserves the right, subject to mutual agreement with the successful consultant, to extend the terms of this request, at the proposed rate, for a mutually agreed upon period of time. The extension time period can be up to 3 years up to fiscal year ending June 30 2020. Extending upon mutual agreement 1 year at a time.

12. **CANCELLATION OF AGREEMENT**

The Town reserves the right to cancel any contract/agreement, at any time, with thirty (30) days prior written notice to the consultant, should any of the following conditions exist:

- Funds are not appropriated by the Town for continuance of this agreement.
- The Town, through changes in its requirements, method of operation, or program operation no longer has a need for the service.

13. **INCURRING COST**

The Town will not be held responsible for any costs incurred by the firm for work performed in the preparation and production of the proposal or for any work performed prior to the issuance of a contract.

14. **REJECTION OF PROPOSAL**

The Town reserves the right to reject any or all proposals in whole or in part or to waive any informality or technicality, irregularity or omissions if, in its judgment, the best interest of the Town shall be served.

15. **PROPRIETARY INFORMATION**

The Town will not disclose any portion of the proposals except to members of the Evaluation Team prior to contract award. The Town retains the right to disclose the name of the successful consultant, the financial considerations, and any other information in the proposal that is pertinent to the selection of the Consultant.

16. **TERMINATION FOR DEFAULT OR FOR THE CONVENIENCE OF THE CONTRACTING AGENCY**

Performance under this contract resulting from this RFQ/P may be terminated by the Town whenever:

- a. The Consultant, in the sole opinion of the TOWN, is in default of the performance of the contract and shall fail to correct such default within the period specified by the TOWN in a notice specifying default; or the TOWN shall determine that the termination is in its best interest.

- b. Termination will be effected by delivery to the Consultant of a notice to terminate, stating the date upon which the termination becomes effective. Upon receipt of the notice to terminate, the Consultant shall:
 - I. Prepare to stop all work by the termination date.
 - II. Meeting with the Town's representative to review work in progress to determine time critical tasks and to take such action as is necessary to protect the Town's rights.
 - III. Cooperate and participate when needed in the orderly transition of the work being performed by the Consultant.

17. **AMBIGUITY IN THIS REQUEST FOR PROPOSAL**

Prior to submitting a response to this request, it is the responsibility of the Consultant to bring to the attention of the Town any ambiguity in this request. Not to do so shall result in the Consultant forfeiting any claim for adjustment based on such ambiguity as should have been noted by a prudent Consultant.

18. **OWNERSHIP INFORMATION**

The Town shall have unlimited right to use, disclose, or duplicate, for any purpose whatsoever, all information developed, derived, documented, or furnished by the Consultant under any contract resulting from this RFQ/P.

In the event of contract award, all data collected and other documentation produced as part of the contract will become the exclusive property of the Town and may not be copied or removed by any employee of the Consultant without written permission of the Town.

19. **INSURANCE REQUIREMENTS**

The Consultant, upon the submission of a proposal shall deliver to the Town proof of professional liability insurance in the sum of one (\$1,000,000) million dollars issued by a reputable insurance company. This insurance must be maintained throughout this engagement and proof thereof must be provided upon request.

20. **ADDENDUMS**

It is the responsibility of all proposal submitters to verify with the Town if any addendums or changes to this have been. All and any addendums will be posted on the Town of Trumbull – Purchasing department website. www.trumbull-ct.gov .

**TOWN OF TRUMBULL
REQUEST FOR QUALIFICATIONS/PROPOSAL
ENERGY EFFICIENCY CONSULTING SERVICES**

RFQ/P #6167

DUE: MARCH 10, 2016 @ 2:00 P.M.

OBJECTIVES, SCOPE OF SERVICES, GOALS, REQUIREMENTS

A. OBJECTIVES

The objective in issuing this Request for Qualifications/Proposal is to provide a competitive means by which to select a Qualified Energy Efficiency Services Consultant to assess the needs of the Town and develop/support the implementation of a comprehensive program which will reduce costs and upgrade Town of Trumbull facilities. The comprehensive program will include but not be limited to:

1. Design and installation of energy efficient equipment and systems which will reduce energy consumption associated with the HVAC system, lighting system, building envelope, the domestic hot water system and other energy using systems.
2. Implementation of programs which may not reduce energy consumption but rather are aimed at cost savings.
3. Retrofit of existing lighting systems.
4. Insure that operations staff in the affected buildings are trained on new equipment and systems
5. Ability to perform energy audits.
6. Ability to measure and verify savings.
7. Ability to design projects and programs that guarantees the total project costs will be 100% covered through existing budgets, and achieved energy savings, in the event the town deems necessary.

Project Goals are summarized as follows:

1. Energy Consumption reduction
2. Energy Cost reduction
3. Upgrade existing infrastructure in the areas of HVAC, BAS and lighting
4. Improve occupancy comfort and IAQ
5. Design of projects to insure "paid for by energy savings"

B. SCOPE OF SERVICES

The selected consultant will be asked to provide professional services as follows:

1. Preliminary assessment of the energy consumption of all Town facilities as identified and prioritized
2. Analyze the HVAC systems and controls and analyze the energy usage factors such as load working hours and site conditions
3. Recommend, and design, energy efficient systems
4. Develop Scopes of work and Bid packages for identified projects
5. Provide detailed drawings and specifications showing engineering and design solutions for energy conservation measures, including compliance with applicable codes, rules, laws and regulations
6. Include high performance lighting and advanced lighting controls, energy management systems and savings, and building envelope savings
7. Calculate and verify the cost savings, rebates, and simple payback of those measures.
8. Develop and maximize load shedding strategies for each building.
9. Act on behalf of the Town to access CEEF (Connecticut Energy Efficiency Fund) programs as well as other programs offered from other public utilities companies that offer grant and/or rebate opportunities for the Town.
10. Assist in the bid review process and make recommendations as to the contractor selection process.

C. REQUIREMENTS

This request for Qualifications/Proposal document requires that responders demonstrate the experience, stability and expertise required to develop and implement a comprehensive energy efficiency program for the Town of Trumbull. Eligible responders must be able to demonstrate that the energy management systems and equipment or mechanical systems and equipment to be proposed are industry tested proven technology and ultimately will provide the Town significant reduction in operating expenses. In addition, each responder must demonstrate a successful track record of energy services consulting. Responses from responders not meeting these eligibility requirements shall not be considered and considered as incomplete.

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PROPOSAL REQUIREMENT AND EVALUATION PROCESS

A. PROPOSAL CONTENT AND FORMAT

The technical proposal must contain the following six sections:

1. Introduction

2. Corporate Profile (including all subcontractors) including identification of production facilities.

3. Prior Project Experience Summary

- a) A minimum of five references, including name, position, address, and telephone numbers, for prior or ongoing projects conducted by the Consultant, with a brief description of the *relevant work* performed for each client *that highlights the elements that are similar to the Trumbull project*. Each subcontractor should provide three references. (The proposal evaluation team, at its option, may request further references to clarify specific claimed experience.) These references and project descriptions will be used to confirm and validate the responses made in the Comparative Evaluation Criteria form.
- b) Documentation to support the Contractor's ability to provide the deliverables requested in accordance with the technical specifications including descriptions of completed projects.

4. Names and Resumes of Key Personnel

- a) The name of each individual who will:
 - Be responsible to work with the Town's project manager in coordination of this project's activities.
 - Be responsible for the delivery of any work product (i.e., "deliverable"), including any presentations.
- b) Qualifications and work experience with comparable clients for all personnel on the prime and any sub-contractors. In particular, the Town is interested in understanding if the personnel proposed for this project worked on the projects that are used as references.

5. Required Support from the Town

A description of any support needed from the Town, other than availability of appropriate individuals to meet with the consultant(s) for coordination purposes.

6. Plan for Services

The following is a listing of text that must be included in the Plan for Services. Any consultant who does not include the requested information may be disqualified from consideration.

- a) A concise but responsive description of methods used, including specifics requested for all tasks identified under in this request.
- b) A clear description of activities to be subcontracted if any, including the name and address of subcontractor.
- c) A work schedule and timeline with proposed major delivery milestones, including Town responsibilities.
- d) Quality Assurance/Quality Control procedures.

7. Capabilities

Provide a detailed description of the firm's total capabilities; include but do not limit descriptions to the following areas:

- a) Existing facilities and proximity to the Town of Trumbull.
- b) Turn-key technical solutions including engineering design and construction.
- c) Maintenance and service of systems and/or equipment installed as part of a performance contract, including remote monitoring.
- d) Discuss managed maintenance, i.e. to what extent you plan to use such programs as corrective, preventive, predictive, proactive, and reliability-centered maintenance; purchasing and inventory control; and computer controls to optimize maintenance savings.
- e) Project management.
- f) Customer training programs.
- g) Specialized capabilities, i.e., air quality, other environmental improvements, and code compliance.
- h) Provide an overview of applicable technology that your firm provides in the area of environmental control in addition to applicable energy retrofit offerings.
- i) Protection against technical obsolescence.
- j) Continued oversight of new technology improvements for consideration over the term of the contract.

8. The cost proposal must contain:

- a) Cost Form submitted in a separately sealed envelope.
- b) The proposal form provided with this RFQ/P must be completed and submitted. For any additional alternatives that might be proposed which would have a cost impact an additional copy of the relevant cost sheet with appropriate descriptive heading and prices must be included if the cost impact cannot be included on the Cost Form.

B. TOWN PROPOSAL EVALUATION PROCESS

The selection team shall evaluate all documents submitted in response to this RFQ/P. Responses shall be evaluated on:

- a) A demonstrated Knowledge and Understanding of the Work to be performed.
- b) A demonstrated understanding of the Town's energy needs and activities and the overall competence and reputation of the firm.
- c) A demonstration of experience performing the various types of work/activity required to meet the Town's objectives and the firm's background and experience for similar representation for other comparable entities.
- d) A demonstrated ability to produce the various studies, reports, evaluations, and written plans.
- e) The firm's qualifications and experience of key personnel and identified employees.
- f) A demonstrated knowledge of facility needs, integration issues, and planning assessment necessary to meet the Town's priorities.
- g) Similar Project Experience (Include complete descriptions and key contact personnel).
- h) Project Organization, Staff, and Project Management.
- i) Proposed Fee Arrangements and Cost:
 - Fee arrangements to be presented in an hourly service fee breakdown and lump sum format. Firms may include costs for additional related services not covered under the attached specifications. These costs should be clearly identified as "Not Included in the Scope of this Proposal," and listed in an hourly or lump sum format, and attached as a separate page of your firm's proposal.
- j) Effectiveness of the Presentation and Quality of Interview.
- k) Expertise and knowledge of rules and regulations mandated by the Local, State, and Federal Government entities.
- l) The firm's demonstrated ability to work effectively with Town officials and employees.

- m) The firm's current workload and ability to provide services within the time allotted.
- n) Fee proposal and Hourly Rates.

C. SELECTION PROCESS

The Town may choose a consultant or consultants to make presentations. Each presenting firm would be asked to make a formal presentation at an interview followed by a question and answer period. Final approval will be made by the Town and with the ultimate selection determined upon what is in the best interest of the Town of Trumbull.

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REFERENCES

(To be submitted with proposal – attach additional pages as necessary)

Please include references for similar consulting services provided for at least five (5) clients in the past five (5) years (attach any other client references if desired). **PLEASE NOTE IT IS THE TOWN'S INTENT TO COMMUNICATE WITH THE REFERENCES LISTED HEREIN.**

CLIENT 1:

Organization Name & Address: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Description: _____

CLIENT 2:

Organization Name & Address: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Description: _____

CLIENT 3:

Organization Name & Address: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Description: _____

CLIENT 4:

Organization Name & Address: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Description: _____

CLIENT 5:

Organization Name & Address: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Description: _____

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PROPOSAL

The undersigned, in compliance with this RFQ/P affirms that it has examined the specifications and related documents contained herein and proposes to provide this service in accordance with this RFQ/P at the prices agreed to.

The undersigned certifies that this proposal meets all the specifications, requirements and conditions requested herein. Any substitutions to the specifications requested are clearly and completely noted and attached. Any alternate proposals are presented in similar format as requested and are attached herein. It is understood that the Town reserves the right to reject any or all proposals.

N.B. THE PROPOSAL FORM SHOULD BE SUBMITTED IN A SEPARATE SEALED ENVELOPE

Applicable hourly rates: (if applicable)

<u>Discipline (type):</u>	<u>Hourly Rate</u>
PE Services_____	_____ /HR
Project Management_____	_____ /HR
Project Development_____	_____ /HR
Energy Calculations_____	_____ /HR
Project Engineer_____	_____ /HR
Technician Draftsman_____	_____ /HR
Administrative support_____	_____ /HR

Other: _____
Attach additional sheets if necessary to further explain rates and fees

Company Name

by (Signature)

Street Address

Print Name (A Duly Authorized Representative)

City, State, ip

Title

Date

Telephone/Fax

Email

website