
Ohio Department of Administrative Services
Ted Strickland, *Governor*
Hugh Quill, *Director*

General Services Division
State Architect's Office
4200 Surface Road
Columbus, Ohio 43228-1395

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April 1, 2009

«Company_Name»
«Address»
«City», «State» «Zip»

Request for Qualifications
Project Number DAS-097108
Statewide Energy Audits – Phase 1
Ohio Department of Administrative Services
Columbus, Ohio

Dear Consultant:

You are invited to submit a Technical Proposal for energy auditing services as described in this Request for the subject project. The facilities to be audited will be assigned by SAO with the consent of the consultant.

The Technical Proposal shall convey information regarding your company's available personnel, professional qualifications, proposed consultants and relevant past experience for energy audits of the Project as described in this Request.

The Technical Proposals will be evaluated upon receipt and the most qualified Consultants will be selected. The successful Consultant will then be requested to furnish, on an expedited basis, a Fee Proposal based on the Scope of Services described in Exhibit 1 of this request.

The successful Consultant will be required to utilize an executed SAO standard Personal Services Agreement for the described services.

CRITERIA FOR SELECTION OF CONSULTANT:

The Consultant may include any additional information it believes is relevant. An identifiable tab sheet shall precede each section of a Proposal, and each Proposal must follow the format outlined below. All pages, except pre-printed technical inserts, shall be sequentially numbered.

Each Proposal must include sufficient data to allow the evaluation committee to verify the total cost for the Project and all of the Consultant's claims of meeting the RFP's requirements. Each Proposal must respond to every request for information in this Attachment 1 whether the request requires a simple "yes" or "no" or requires a detailed explanation. Simply repeating the RFP's requirement and agreeing to comply will be an unacceptable response and may cause the Proposal to be rejected.

Any material deviation from the format outlined below may result in a rejection of the non-conforming Proposal.

Each Proposal must contain the following:

1. Consultant Profile
2. Subcontractor Profile
3. Staffing Plan
4. Personnel Profile Summaries
5. Technical Approach
6. Project Schedule
7. Support Requirements

Profile. Each Proposal must include a profile of the Consultant and its relevant experience working on projects similar to this Project:

- Consultant's legal name, address, and telephone number;
- Date established;
- Consultant's Federal Tax Identification number;
- Principal place of business;
- Local office from which Project will be managed;
- Ownership (such as public firm, partnership, or subsidiary);
- Firm leadership (such as corporate officers or partners);
- Number of employees;
- Number of employees engaged in work directly related to the Project;
- Contact person for all correspondence regarding this RFP, to include name, title, phone number, fax number, postal address, and e-mail address;
- List of subcontractors, if any, that the Consultant will use on the Project;
- Any other background information that will help the evaluation committee gauge the Consultant's ability to successfully complete the Project.

The Consultant must also include three references for which the Consultant has successfully provided services on projects that were similar in their nature, size, and scope to the Project. These references must be from current projects or projects that were completed within the past seven years.

Each reference shall be willing to discuss the Consultant's performance on the referenced project with the evaluation committee.

Subcontractor Profile. For each proposed subcontractor, the Consultant must attach a letter from the subcontractor, signed by a representative authorized to legally bind the subcontractor, with the following included in the letter:

- a. The subcontractor's legal name, tax identification number, and principal place of business address;
- b. Printed name and phone number of the authorized subcontractor representative;
- c. A description of the Work the subcontractor will perform;
- d. A certified commitment to perform the Work if the Consultant is selected;
- e. A certified statement that the subcontractor has read and understood the RFP and will comply with the requirements of the RFP.

Staffing Plan. The Consultant must provide a staffing plan that identifies all personnel required to perform the Project. The plan must have the following information:

- a. A matrix matching each key team member to the staffing requirements in this RFP.
- b. A contingency plan that shows the ability to add more staff if needed to meet the Project's due date(s).
- c. A discussion of the Consultant's ability to provide qualified replacement personnel.

The Consultant must submit a statement that clearly indicates the time commitment of the proposed Project team, including the Project Manager, to this Project and other projects during the term of the Contract. The Consultant must also include a statement indicating to what extent, if any, the Project Manager may be used on other projects during the term of the Contract. The evaluation committee may reject any Proposal that commits the proposed Project Manager to other projects during the term of the Project if the committee believes that doing so will be detrimental to the Consultant's performance.

One of the criteria on which the State will base the award of the Contract is the quality of the Consultant's Project team. Switching personnel after Contract award shall not be permitted without the State's prior written approval.

Personnel Profile Summaries. Each Proposal must include a profile for each member of the proposed Project team. Consultants may duplicate this form and complete it for each team member. If additional space is needed for completion of the form for any team member, the Consultant should use the back of the form. Each form must be completed using the format given in the attachment. The various sections of the form are described below.

- a. Name and Title.
- b. Education and Training. This section must be completed to list the education and training of the proposed candidates and will demonstrate, in detail, the proposed candidate's ability to properly execute the Contract based on the relevance of the education and training to the requirements of the RFP.
- c. References. Provide three references for which the proposed candidate has successfully demonstrated meeting the requirements of the RFP on a project of similar size and scope within the past seven years. If fewer references are provided, the Consultant must include an explanation. For each reference the following information must be provided:
 1. Contact Information. The contact name, phone number, company name, and address. An alternate contact name in the company, address, and phone number shall also be provided, in case the primary contact cannot be reached.
 2. Dates of Service. Must be completed to show the length of time the candidate performed the technical experience being described, not the length of time the candidate worked for the company. The Consultant must complete these dates with a beginning month and year and an ending month and year.
 3. Description of the Related Service Provided. Consultants must reiterate the technical experience being described, including the capacity in which the experience was performed and the role of the candidate in the project. It is the Consultants'

responsibility to customize the description to clearly substantiate the candidate's qualification.

- d. Resume. The candidate's resume must follow the completed form.

Technical Approach. The Consultant must fully describe its approach, methods, and specific work steps for completing this Project and producing the deliverables required under the Contract. The State seeks insightful responses that demonstrate a thorough understanding of the nature of the Project and the Owner's needs and limitations. Recommended solutions should demonstrate that the Consultant would be prepared to quickly undertake and successfully complete the required tasks. The Consultant should describe the Consultant's experience and ability to work in an educational environment and campus setting occupied by a diverse student population.

The Consultant's work plan should be consistent with its staffing plan, project schedule, support requirements, and other parts of its Proposal.

For each energy conservation measure ("ECM") listed in the work plan, the Consultant must complete the ECM Form included with this RFP.

Project Schedule. The Consultant must provide a detailed Project schedule for significant Project milestones and deliverables. The Project schedule should be delivered as a bar chart, showing all major Project tasks on a week-by-week schedule to serve as the basis for managing the Project. The Consultant must also identify and describe all risk factors associated with the forecasted milestone schedule.

The services will be conducted in the months of May, and June, 2009. All reports must be delivered before July 15 and be accompanied by the final payment request.

Support Requirements. The Consultant must describe the nature and extent of the support it requires from the State to accomplish the Project other than what the State has offered elsewhere in this RFP.

The State may not be able or willing to provide the additional support the Consultant lists in this part of its Proposal. The Consultant must therefore indicate whether its request for additional support is a requirement for its performance. If any part of the list is a requirement, the State may reject the Consultant's Proposal if the State is unwilling or unable to meet the requirements.

SUBMITTALS:**A. TECHNICAL PROPOSAL:**

1. ***A pre-proposal meeting will be held on April 10, 2009 at 10:00 am.*** The meeting will be held at the General Services Center, 4200 Surface Road, Columbus, Ohio 43228 in the Walnut/Willow conference room.
2. No fee proposals are due at this time.
3. Technical Proposals are to be received in our office no later than 3:00 pm on April 15, 2009. Please indicate any Sub-consultants you plan to utilize. No Fee Proposals are being solicited at this time, (see Fee Proposal requirements below).
4. All Technical Proposals will be immediately reviewed and a successful Consultant selected. Negotiations will then be held with SAO to establish the final Scope of Services and Fee.
5. Please address your Technical Proposal (1 copy, no binders) to:

Shelby Banton
State Architect's Office
4200 Surface Road
Columbus, Ohio 43228-1395

Lane Beougher will assist in addressing any questions you may have at 614.752-0013 or fax at 614.644.7982.

B. FEE PROPOSAL:

1. The Fee Proposal shall be inclusive of all work required to perform all Auditing Services as described in this request, based on a predetermined square footage rate. The State intends to enter into a single contract only for the requested services described herein.

Good luck and we look forward to working with you in the near future.

Sincerely,

Lane Beougher, AIA
Program Services Manager
State Architect's Office

Attachment: Exhibit 1

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EXHIBIT 1

Statewide Energy Audit – Phase 1

Eligible Energy Conservation Measures. The audit should identify opportunities to maximize energy savings and financial benefit through energy conservation measures at the Site. Energy conservation measure means an installation or modification of an installation in, or a remodeling of, an existing building in order to reduce energy consumption and operating costs. The term includes the installation, modification, and replacement of:

- Insulation in building structure and systems within the building;
- Storm windows and doors, multi-glazed windows and doors, and heat absorbing or heat reflective glazed and coated window and door systems; additional glazing; reductions in glass area; and other window and door system modifications that reduce energy consumption and operating costs;
- Automatic energy management control systems;
- Heating, ventilating, and air conditioning systems;
- Caulking and weather-stripping;
- Lighting fixtures to increase the energy efficiency of the lighting system without changing the overall illumination of a building, unless an increase in illumination is necessary to conform to the applicable state or local building code for the proposed lighting system;
- Energy recovery systems;
- Cogeneration systems that produce steam or heat as well as electricity, for use primarily within a building or complex of buildings;
- Any other modification, installation, or remodeling approved by the Engineer as an energy conservation measure.
- Analysis of utility bills and a determination if the agency is entering bills into Portfolio Manager correctly.

Walk-through. A walk-through will be coordinated and conducted by the Consultant. Site access for the purposes of data collection must be scheduled at the convenience of the Owner. During the walk-through, the Consultant will be escorted and afforded access to the facility. The Owner's Representative will be the sole point of contact during the walk-through.

Audit Report

Cost and Savings Summary. The Consultant must use the State's Cost and Savings Summary and Certification Form provided. The Consultant must fill in all relevant blank spaces in the Cost and Savings Summary and Certification Form in ink or typewritten and not in pencil. The Consultant must initial any alteration or erasure on the Cost Summary Form.

The Consultant must show all amounts in both words and figures. In the case of a conflict between the words and figures, the amount shown in words shall govern, where such words are not ambiguous. When the Consultant's intention and the meaning of the words are clear, omissions or misspellings of words will not render the words ambiguous.

The figures from individual ECM Forms must be summed to equal the figures shown on the Cost and Savings Summary Form. The Consultant must indicate on the Cost and Savings Summary Form:

Item 1 - Average annual energy savings, in today's dollars, based upon the recommended ECM. Savings from electricity, natural gas, water and sewer, propane, diesel fuel, or other fuels may be included on this line. Maintenance savings must not be included in Line 1.

Item 2 - Estimated construction cost necessary to achieve the savings of Item 1. This amount must include all costs associated with the Project, including without limitation: design, equipment, material, labor, disposal, warranties, equipment service agreements, and financing costs.

Item 3 - Estimated time of completion, in consecutive days.