

REQUEST FOR PROPOSALS (RFP) 20084

Energy Action Plan for the City of Livingston

**CITY OF LIVINGSTON
220 E. Park Street
Livingston, MT 59047
(406) 823-6000**

Key RFP Dates

| | |
|---------------------------------|-----------------------|
| Issue Date: | May 20, 2024 |
| Question Submittal Date: | June 7th, 2024 |
| Proposal Submittal Date: | June 21, 2024 |

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SECTION I. INSTRUCTIONS TO PROPOSERS

A. PRE-PROPOSAL CONFERENCE

A pre-proposal conference will not be held for this procurement. Proposers may submit questions or clarifications as noted in Section E., below.

B. EXAMINATION OF PROPOSAL DOCUMENTS

By submitting a proposal, Proposer represents that it has thoroughly examined and become familiar with the work required under this RFP and that it is capable of performing quality work to achieve the City's objectives.

C. ADDENDA

The City reserves the right to revise the RFP documents. Any City changes to the requirements will be made by written addendum to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any resulting Agreement. The City will not be bound to any modifications to or deviations from the requirements set forth in this RFP as the result of oral instructions. Proposers shall acknowledge receipt of addenda in their proposals. Failure to acknowledge receipt of Addenda may cause the proposal to be deemed non-responsive to this RFP and be rejected.

D. CITY CONTACT

All communication and/or contacts with City staff regarding this RFP are to be directed to the following:

Greg Anthony
220 E. Park Street
Livingston, MT 59047
Phone: (406) 823-6000

Commencing on the date of the issuance of this RFP and continuing until award of the contract or cancellation of this RFP, no proposer, subcontractor, lobbyist or agent hired by the proposer shall have any contact or communications regarding this RFP with any City's staff; member of the evaluation committee for this RFP; or any contractor or consultant involved with the procurement, other than the point of contact named above or unless expressly permitted by this RFP. Contact includes face-to-face, telephone, electronic mail (e-mail) or formal written communication. Any proposer, subcontractor, lobbyist or agent hired by the proposer that engages in such prohibited communications may result in disqualification of the proposer at the sole discretion of the City.

E. CLARIFICATIONS

1. Examination of Documents

Should a Proposer require clarifications of this RFP, the Proposer shall notify the City in writing in accordance with Section E.2. below. Should it be found that the point in question is not clearly and fully set forth, the City will issue a written addendum clarifying the matter posted on the City website.

2. Submitting Requests

- a. All questions must be put in writing and must be received by the City no later than 2:00 p.m., on June 7, 2024.
- b. Requests for clarifications, questions and comments must be clearly labeled, "RFP 20084 Questions". The City is not responsible for failure to respond to a request that has not been labeled as such.
- c. Any of the following methods of delivering written questions are acceptable as long as the questions are received no later than the date and time specified above:
 - (1) U.S. Mail: CITY OF LIVINGSTON, 220 E. Park Street, Livingston MT 59047.
 - (2) Personal Delivery: City of Livingston, Lobby Receptionist, Livingston MT 59047.
 - (3) Email: ganthony@LivingstonMontana.org

3. City Responses

Responses from the City will be posted on the website no later than June 11, 2024 at 5:00pm. Inquiries received after 2:00 p.m. on June 7, 2024 will not be responded to.

F. SUBMISSION OF PROPOSALS

1. Date and Time

Proposals must be received in the City's office at or before 2:00 p.m. on June 21, 2024.

Proposals received after the above-specified date and time will be returned to Proposers unopened.

2. Address

Proposals delivered in person or by a means other than the U.S. Postal Service shall be submitted to the following:

**CITY OF LIVINGSTON
220 E. Park Street
Livingston, MT 59047
Attention: Greg Anthony**

Or proposals delivered using the U.S. Postal Services shall be addressed as follows:

**CITY OF LIVINGSTON
220 E. Park Street
Livingston, MT 59047
Attention: Greg Anthony**

Or proposals delivered electronically shall be addressed as follows:

GANTHONY@LIVINGSTONMONTANA.ORG

3. Identification of Proposals

Proposer shall submit an **original and 3 copies** of its proposal in a sealed package, addressed as shown above in F.2. The outer envelope must show the Proposer's name and address and clearly marked with RFP number (20084). In addition to the above, Proposers shall also include one (1) electronic copy of their entire RFP submittal package in "PDF" format, on a flash drive. If electronic method is utilized, one PDF copy is appropriate. Files should be no larger than 20mb. **Electronic submissions are preferred.**

4. Acceptance of Proposals

- a. The City reserves the right to accept or reject any and all proposals, or any item or part thereof, or to waive any informalities or irregularities in proposals.
- b. The City reserves the right to withdraw or cancel this RFP at any time without prior notice and the City makes no representations that any contract will be awarded to any Proposer responding to this RFP.
- c. The City reserves the right to issue a new RFP for the project.
- d. The City reserves the right to postpone proposal openings for its own

convenience.

- e. Each proposal will be received with the understanding that acceptance by the City of the proposal to provide the services described herein shall constitute a contract between the Proposer and City which shall bind the Proposer on its part to furnish and deliver at the prices given and in accordance with conditions of said accepted proposal and specifications.
- f. The City reserves the right to investigate the qualifications of any Proposer, and/or require additional evidence of qualifications to perform the work.
- g. Submitted proposals are not to be copyrighted.

G. PRE-CONTRACTUAL EXPENSES

The City shall not, in any event, be liable for any pre-contractual expenses incurred by Proposer in the preparation of its proposal. Proposer shall not include any such expenses as part of its proposal.

Pre-contractual expenses are defined as expenses incurred by Proposer in:

- 1. Preparing its proposal in response to this RFP;
- 2. Submitting that proposal to the City;
- 3. Negotiating with the City any matter related to this proposal; or
- 4. Any other expenses incurred by Proposer prior to date of award, if any, of the Agreement.

H. JOINT OFFERS

Where two or more firms desire to submit a single proposal in response to this RFP, they should do so on a prime-subcontractor basis rather than as a joint venture. The City intends to contract with a single firm and not with multiple firms doing business as a joint venture.

I. TAXES

The City is a tax-exempt political subdivision of the State of Montana.

J. PROTEST PROCEDURES

The City has on file a set of written protest procedures applicable to this solicitation that may be obtained by contacting the City point of contact responsible for this procurement. Any protests filed by a Proposer in connection with this RFP must be submitted in accordance with the City's written procedures.

K. CONTRACT TYPE

It is anticipated that the Agreement resulting from this solicitation, if awarded, will be a firm-fixed price contract specifying firm-fixed prices for individual tasks specified in the Scope of Work, included in this RFP as Exhibit A.

L. CONFLICT OF INTEREST

All Proposers responding to this RFP must avoid organizational conflicts of interest which would restrict full and open competition in this procurement. An organizational conflict of interest means that due to other activities, relationships or contracts, a Proposer is unable, or potentially unable to render impartial assistance or advice to the City; a Proposer's objectivity in performing the work identified in the Scope of Work is or might be otherwise impaired; or a Proposer has an unfair competitive advantage. Conflict of Interest issues must be fully disclosed in the Proposer's proposal.

All Proposers must disclose in their proposal and immediately throughout the course of the evaluation process if they have hired or retained an advocate to lobby City staff or the City Commission on their behalf.

Proposers hired to perform services for the City are prohibited from concurrently acting as an advocate for another firm who is competing for a contract with the City, either as a prime or subcontractor.

M. CODE OF CONDUCT

All Proposers agree to comply with the City's Code of Conduct which is hereby referenced and by this reference is incorporated herein.

SECTION II: PROPOSAL CONTENT

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A. PROPOSAL FORMAT AND CONTENT

1. Format

Proposals should be typed with a standard 12-point font, double-spaced and submitted on 8 1/2" x 11" size paper, using a single method of fastening. Charts and schedules may be included in 11"x17" format. Proposals should not include any unnecessarily elaborate or promotional materials. Proposals should not exceed twenty-five (25) pages in length; however, having 25 double-sided pages is acceptable.

2. Letter of Transmittal

The Letter of Transmittal shall be addressed to Greg Anthony and must, at a minimum, contain the following:

- a. Identification of Proposer that will have contractual responsibility with the City. Identification shall include legal name of company, corporate address, telephone number, and email address. Include name, title, address, email address, and telephone number of the contact person identified during period of proposal evaluation.
- b. Identification of all proposed subcontractors including legal name of company, whether the firm is a Disadvantaged Business Enterprise (DBE), contact person's name and address, phone number and fax number, and email address; relationship between Proposer and subcontractors, if applicable.
- c. Acknowledgement of receipt of all RFP addenda, if any.
- d. A statement to the effect that the proposal shall remain valid for a period of not less than ninety (90) days from the date of submittal.
- e. Signature of a person authorized to bind Proposer to the terms of the proposal.
- f. Signed statement attesting that all information submitted with the proposal is true and correct.

3. Technical Proposal

- a. Qualifications, Related Experience, and References of Proposer

This section of the proposal should establish the ability of Proposer to satisfactorily perform the required work by reasons of: experience

in performing work of a similar nature; demonstrated competence in the services to be provided; strength and stability of the firm; staffing capability; work load; record of meeting schedules on similar projects; and supportive client references.

Proposer to:

- (1) Provide a brief profile of the firm, including the types of services offered; the year founded; form of the organization (corporation, partnership, sole proprietorship); number, size and location of offices; and number of employees.
- (2) Describe the firm's experience in performing work of a similar nature to that solicited in this RFP, and highlight the participation in such work by the key personnel proposed for assignment to this project.
- (3) Identify subcontractors by company name, address, contact person, telephone number, email, and project function. Describe Proposer's experience working with each subcontractor.
- (4) Provide as a minimum three (3) references for the projects cited as related experience, and furnish the name, title, address, telephone number, and email address of the person(s) at the client organization who is most knowledgeable about the work performed. Proposer may also supply references from other work not cited in this section as related experience.

b. Proposed Staffing and Project Organization

This section of the proposal should establish the method, which will be used by the Proposer to manage the project as well as identify key personnel assigned.

Proposer to:

- (1) Identify key personnel proposed to perform the work in the specified tasks and include major areas of subcontract work. Include the person's name, current location, proposed position for this project, current assignment, level of commitment to that assignment, availability for this assignment and how long each person has been with the firm.
- (2) Furnish brief resumes (not more than two [2] pages each) for the proposed Project Manager and other key personnel that

includes education, experience, and applicable professional credentials.

- (3) Indicate adequacy of labor resources utilizing a table projecting the labor-hour allocation to the project by individual task.
- (4) Include a project organization chart, which clearly delineates communication/reporting relationships among the project staff.
- (5) Include a statement that key personnel will be available to the extent proposed for the duration of the project acknowledging that no person designated as "key" to the project shall be removed or replaced without the prior written concurrence of the City.

c. Work Plan

Proposer should provide a narrative, which addresses the Scope of Work, and shows Proposer's understanding of City's needs and requirements.

Proposer to:

- (1) Describe the approach to completing the tasks specified in the Scope of Work. The approach to the work plan shall be of such detail to demonstrate the Proposer's ability to accomplish the project objectives and overall schedule.
- (2) Furnish a project schedule for completing the tasks in terms of elapsed weeks.
- (3) Identify methods that Proposer will use to ensure quality control as well as budget and schedule control for the project.
- (4) Identify any special issues or problems that are likely to be encountered in this project and how the Proposer would propose to address them.
- (5) Proposer is encouraged to propose enhancements or procedural or technical innovations to the Scope of Work that do not materially deviate from the objectives or required content of the project.

d. Exceptions/Deviations

State any technical and/or contractual exceptions and/or deviations from the requirements of this RFP. If no technical or contractual exceptions and/or deviations are submitted as part of the original

proposal, Proposers are deemed to have accepted the City's technical requirements set forth in the Scope of Work (Exhibit A).

4. Cost and Price Proposal

As part of the cost and price proposal, the Proposer shall submit proposed pricing to provide the services for each work task described in Exhibit A, Scope of Work. The city's budget for this project is \$50,000.00.

The Proposer shall complete the "Price Summary Sheet" form included with this RFP (Exhibit B), and furnish any narrative required to explain the prices quoted in the schedules. It is anticipated that the City will issue a firm-fixed-price contract specifying firm-fixed-prices for individual tasks.

5. Appendices

Information considered by Proposer to be pertinent to this project and which has not been specifically solicited in any of the aforementioned sections may be placed in a separate appendix section. Proposers are cautioned, however, that this does not constitute an invitation to submit large amounts of extraneous materials. Appendices should be relevant and brief.

SECTION III: EVALUATION AND AWARD

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A. EVALUATION CRITERIA

The City will evaluate the offers received based on the following criteria:

1. **Qualifications of the Firm** **30 %**

 Technical experience in performing work of a closely similar nature; strength and stability of the firm; strength, stability, experience and technical competence of subcontractors; assessment by client references.

2. **Staffing and Project Organization** **25%**

 Qualifications of project staff, particularly key personnel and especially the Project Manager; key personnel's level of involvement in performing related work cited in "Qualifications of the Firm" section; logic of project organization; adequacy of labor commitment; concurrence in the restrictions on changes in key personnel.

3. **Work Plan** **35%**

 Depth of Proposer's understanding of City's requirements and overall quality of work plan; logic, clarity and specificity of work plan; appropriateness of resource allocation among the tasks; reasonableness of proposed schedule; utility of suggested technical or procedural innovations.

4. **Cost and Price** **10 %**

 Reasonableness of the total price as well as the individual tasks; competitiveness with other offers received; adequacy of data in support of figures quoted.

B. EVALUATION PROCEDURE

An evaluation committee will be appointed to review all proposals received for this RFP. The committee is comprised of City staff and may include outside personnel. The committee members will evaluate the written proposals using criteria identified in Section III A. A list of top-ranked proposals, firms within a competitive range, will be developed based upon the totals of each committee members' score for each proposal.

During the evaluation period, the City may interview some or all of the proposing firms. The interview may consist of a short presentation by the Proposer after which the evaluation committee will ask questions related to the firm's proposal and qualifications.

At the conclusion of the proposal evaluations, Proposers remaining within the competitive range may be asked to submit a Best and Final Offer (BAFO). In the BAFO request, the firms may be asked to provide additional information, confirm or clarify issues and submit a final cost/price offer. A deadline for submission will be stipulated.

At the conclusion of the evaluation process, the evaluation committee will recommend to City's management the Proposer whose proposal is most advantageous to the City.

C. AWARD

The City may negotiate contract terms with the selected Proposer prior to award, and expressly reserves the right to negotiate with several Proposers simultaneously and, thereafter, to award a contract to the Proposer offering the most favorable terms to the City.

Negotiations may or may not be conducted with Proposers; therefore, the proposal submitted should contain Proposer's most favorable terms and conditions, since the selection and award may be made without discussion with any Proposer.

The selected Proposer will be required to submit to the City's Accounting department a current IRS W-9 form prior to commencing work.

D. NOTIFICATION OF AWARD AND DEBRIEFING

Proposers who submit a proposal in response to this RFP shall be notified via email of the contract award. Such notification shall be made within three (3) business days of the date the contract is awarded.

Proposers who were not awarded the contract may obtain a debriefing concerning the strengths and weaknesses of their proposal. Unsuccessful Proposers, who wish to be debriefed, must request the debriefing in writing or electronic mail and the City must receive it within three (3) business days of notification of the contract award.

EXHIBIT A: SCOPE OF WORK

SCOPE OF SERVICES

Cities are leading the way toward emission reductions that mitigate climate change through a process called Strategic Energy Management (SEM). Many communities have policies and programs to address climate change with facility and transportation assets being a critical focus of these policies since they comprise a significant amount of U.S. emissions. Improving municipal building and transportation performance represents a unique opportunity to lead the community. Investing in energy management in these asset classes can reduce both operating costs and emissions.

The goal of this project is to help the City of Livingston to: (1) establish a set of Energy Conservation Goals and (2) identify strategies to attain these goals in the future. The attached 2020 Baseline Greenhouse Gas (GhG) Emissions Report for the City of Livingston and Park County highlighted solid waste, wastewater, buildings/facilities, and the city's vehicle fleet as areas that would benefit the most from energy conservation efforts.

The city has a number of facilities that will be the focus of this effort. The key facilities include:

- City Hall
- City-County Complex (Fire & Police Departments only)
- Public Works Campus (including Water Reclamation Facility)
- Six (6) Municipal Drinking Water Wells
- Civic Center
- Cemetery and Parks
- City Fleet

The proposed tasks to be performed include:

- Facilitate a community workshop to identify and solidify energy conservation goals for areas identified in GhG Emissions Report.
- Translate long-term goals into specific, measurable actions.
- Identify energy efficiency projects and conduct assessments to prioritize energy and water efficiency projects.
- Develop a transparent process for benchmarking, monitoring and reporting energy and water use in all municipal buildings.
- Establish revised operational policies for municipal buildings, as necessary.
- Establish renovation and new construction standards for municipal buildings, as necessary.
- Develop a communication plan to help the City inform the community of conservation goals and activities.
- Identify resources needed and define roles and responsibilities for staff to maintain this process.

The anticipated cost of this work is estimated to be \$25,000.

EXHIBIT B: COST AND PRICE FORMS

PRICE SUMMARY SHEET

REQUEST FOR PROPOSALS (RFP) 20084

Enter below the proposed price for each of the work phases described in the Scope of Work, Exhibit A. Prices shall include direct costs, indirect costs, and profits.

PRICE FOR BASE SCOPE OF WORK: _____

1. I acknowledge receipt of RFP **20084** and Addenda No.(s) _____

2. This offer shall remain firm for _____ days from the date of proposal
(Minimum 90)

COMPANY NAME _____

ADDRESS _____

TELEPHONE _____

EMAIL ADDRESS _____

SIGNATURE OF PERSON
AUTHORIZED TO BIND PROPOSER _____

NAME AND TITLE OF PERSON
AUTHORIZED TO BIND PROPOSER _____

DATE SIGNED _____