

Dear Sirs and Mesdames:

**RE: Request for Qualifications for Firms to Design
An Energy and Operational Conservation Program**

The City of Southfield, Michigan is now accepting proposals per the enclosed request. We would appreciate receiving a response from your firm according to these requirements. Enclose your proposal in a sealed envelope and label it with your company name and the name of the project being bid in order to differentiate it from the other correspondence we receive. When mailing proposals, address them as follows:

Purchasing Agent, c/o the City Clerk's Office
City of Southfield, P. O. Box 2055
Southfield, MI 48037-2055

When delivering proposals (i.e. UPS, Federal Express, etc.) address as follows:

Purchasing Agent, c/o the City Clerk's Office
City of Southfield, 26000 Evergreen Road
Southfield, MI 48076

A pre-bid meeting has been scheduled for **Tuesday, June 12, 2007 at 10:30 AM**. Attendance at this meeting is highly recommended for any company wanting to submit a response. Your response must be received no later than **Thursday, June 21, 2007 at 10:30 A.M. local time**. If there are any questions, please call the Purchasing office at (248) 796-5250.

We look forward to receiving your response.

Sincerely,
Rae L. Townsel

Rae L. Townsel, CPPB
Purchasing Agent

City of Southfield, Michigan

Request For Qualifications:

Designing an Energy and Operational Conservation Program

June 2007

26000 Evergreen Road
Southfield, Michigan 48037-2055

SUPPLEMENTAL INSTRUCTIONS TO ALL PROPOSERS

1. **PROPOSAL DEADLINE:** In order for a proposal to receive consideration, it must be received prior to the specified time of opening as indicated on the proposal form. No proposals will be accepted after the time specified for proposal opening. The City reserves the right to postpone the proposal opening for its own convenience. Proposers should use the proposal documents furnished; failure to do so will be considered as an alternate offer and may be cause for rejection. Proposals are considered received when in possession of the City Clerk's office. It is the proposer's responsibility to ensure that proposals are received in the proper location.
2. **WITHDRAWAL:** No proposal will be withdrawn for 60 days from its opening date. Proposers may reduce this period if he states so in his proposal; however, he runs the risk of being declared non-responsive to the specifications.
3. **RIGHT TO REJECT:** The City reserves the right to waive any irregularity in any proposal, to split awards by items or lots (unless otherwise stipulated either in the specifications or by the proposer) or to award to other than the low proposer, should any of the foregoing be deemed in its best interests.
4. **CHANGE OF SPECIFICATION:** If for sufficient reason you wish to revise the specifications or get an interpretation, your request will receive consideration if presented to us as much in advance of the proposal opening date as possible. If a change in specifications is found desirable, the City will notify all proposers and postpone the proposal opening date, if necessary.
5. **TO COMPLY:** For failure to deliver or perform in accord with the accepted proposal, the City may consider the contractor in default and take steps to protect the City's interest. The City may, without impairing its other rights and benefits, purchase all or part of the contract goods or services on the open market and charge any additional costs to the contractor or his surety.
6. **PATENTS:** Contractors will protect and indemnify against expense of any nature, will bear cost of any suits which may arise and will pay all damages which may be awarded against the City for the use, under this specification, of any patented device, process, apparatus, material or invention.
7. **ERRORS OR OMISSIONS:** Proposers are not permitted to take advantage of any errors or omissions in specifications since full instructions will be given should they be called to our attention not less than two working days before the proposals are due.
8. **LOWEST RESPONSIBLE PROPOSER IS ONE WHO:**
 - a. Submits no restrictions or qualifications beyond those permitted in the proposal request.
 - b. Have the skill, quality and ability to conscientiously, faithfully and promptly fulfill the contract to its letter and spirit.
 - c. Have integrity, judgment, reputation and experience.
 - d. Has sound financial resources as well as the ability to furnish any and all bonding and insurance documents required.
 - e. Is able to comply with all terms and conditions stipulated in the proposal requests.
 - f. Can show the intent and ability to cooperate efficiently and effectively with all Government departments involved in the contractual purchase or service.
 - g. Has the knowledge of applicable existing laws and ordinances of the City of Southfield necessary to provide smooth and efficient relations.
 - h. Has unquestionable ability to provide maintenance and service on the contractual items purchased.
9. **NON-COLLUSION CLAUSE:** By signing and submitting this proposal, proposer states that his proposal is genuine and not collusive or sham; such proposer has not colluded, conspired, connived, or agreed, directly or indirectly, with any proposer or person, to put in a sham bid, or that such other person will refrain from proposing and has not in any manner, directly or indirectly, colluded, conspired, connived, or agreed, with any person, to fix the price of affiant or any other proposer, or to fix any overhead, profit or cost element of said proposal price.
10. **NON-DISCRIMINATION CLAUSE:** By signing and submitting this proposal for consideration of an award by the City of Southfield, the contractor and any subcontractor covenants not to discriminate against an employee or applicant for employment with respect to hire, tenure, terms, conditions, or privileges of employment or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex, height, weight, marital status or a disability that is unrelated to the individual's ability to perform the duties of a particular job or position. Breach of this covenant may be regarded as a material breach of the contract.
11. The City of Southfield, Michigan officially distributes bid documents from the Purchasing Department or through the **Michigan Intergovernmental Trade Network (MITN) at www.mitn.info**. The City of Southfield cannot guarantee the accuracy and is not responsible for any errors contained in any information received from alternate sources.

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Request for Qualifications for Firms to Design an Energy and Operational Conservation Program for the City Of Southfield

1. Introduction

- 1.1. The City of Southfield (hereinafter referred to as “City” or “COS”), is requesting Qualified Providers to propose energy and operational conservation measures through a guaranteed energy and operational savings contract. These proposals should include implementation of energy equipment, repair, modernization, maintenance and training services at selected City buildings on a performance contracting basis.

2. Purpose of Request

- 2.1. The City’s objective in issuing this Request For Qualifications (RFQ) is to provide a competitive means in which to select a single Qualified Provider with whom to negotiate a final contract. A detailed audit of District facilities and subsequent plan will be required only if and when the City selects a Qualified Provider. The City will base selection of the Qualified Provider on the following criteria:

<u>Criteria</u>	<u>Weight</u>
Experience and Qualifications ,Reference Review	25%
Technical Approach, Service Capabilities	20%
Financial Plan and Guarantee	25%
Project Implementation	25%
Overall Quality of the Proposal and Interview, Value added Services Offered	5%

3. Selection Process And Time Lines

- 3.1. It is the intention of the COS to use a three step process to select the Qualified Provider that will implement the Performance Contract approach. Phase I will be the completion of the enclosed vendor’s qualification statement. Phase II will be an interview format. Each vendor will be allowed time for a formal presentation followed by questions from City personnel. Phase III will consist of reference checks, possible site visits, interviews with owners and subcontractors, and evaluation of all materials and information provided to date.

- 3.2. The selection process is outlined as follows:

<u>Proposed Date</u>	<u>Event</u>
June 6, 2007	Request for Qualifications (RFQ) Issued
June 12, 2007	10:30 AM Pre-Bid Conference
June 21, 2007	10:30 AM Deadline for receipt of completed RFQ
July TBD, 2007	Notify selected short list of vendors
July TBD, 2007	Interviews with selected vendors
July TBD, 2007	References, Evaluations, Selection
August TBD, 2007	Recommend vendor to City Council

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4. Pre-Proposal Meeting

- 4.1. A pre-proposal meeting has been scheduled for Tuesday, June 12, 2007 at 10:30 AM. Attendance at this meeting is highly recommended for any company wanting to submit a response. This meeting will be held in the Council Study of the City of Southfield Municipal Building, 1st floor at 26000 Evergreen Road, Southfield, Michigan.

5. General Instructions

- 5.1. Contact Person: All proposals should be sent, and any questions or comments directed to:

Rae Townsel, Purchasing Agent
c/o City Clerk's Office
26000 Evergreen Road, Southfield, Michigan 48037-2055
(248) 796-5250

- 5.2. RFQ Due Date: Proposals are due on or before **June 21, 2007 at 10:30 AM EST**. All responses must be in a sealed envelope and clearly marked in the lower left hand corner: "Sealed RFQ – Selection of Qualifications".

- 5.3. Propriety Information: Any restrictions on the use of any data contained within a proposal and all confidential information must be clearly stated in the proposal. Proprietary information will be handled in accordance with the applicable Michigan Statute(s).

- 5.4. Incurring Cost: The COS is not liable for any costs incurred in replying to this RFQ.

- 5.5. Acceptance/Rejection: The COS reserves the right to accept or reject any or all proposals in part or in total, as deemed to be in the best interest of the City, and to waive all minor irregularities in the proposal process.

6. RFQ Response Requirements

- 6.1. The City is requesting RFQ responses from qualified providers to provide a turn-key Performance Contracting program for the COS facilities. The program shall include design, construction, installation, monitoring, maintenance, and financing of an integrated program. Each Request For Qualifications response must include samples of all forms and documents that the Qualified Provider may require the City to execute in the event of award.
- 6.2. Each RFQ Response must guarantee the following:
- 6.2.1. Provide comprehensive energy services for all City buildings, which may include installation of energy savings equipment and material. The specific nature of this equipment is at the discretion of the Qualified Provider.
- 6.2.2. Provide a more comfortable environment for building occupants. This may include repair or modernization of existing environmental systems.
- 6.2.3. The City must not incur initial start up costs. The contractor will provide a financial package, which will allow payments over a specific term. This will allow the City to pay for the program within its existing budget allocations.

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- 6.2.4. The Qualified Provider must be able to demonstrate successful implementation of similar programs at a minimum of (5) five Municipal multiple campus-style facilities in Michigan (Cities preferred).
- 6.2.5. One hundred percent (100%) of all energy and operational savings shall be retained by the City over the life of the contract.
- 6.2.6. The reconciliation of guaranteed sums shall be provided by the Qualified Provider on an annual basis, commencing one year from the date of completion and acceptance of the work by the City.
- 6.3. The Qualified Provider shall provide the City with semi-annual energy audits and full descriptions of same.
 - 6.3.1. The Qualified Provider's energy and operational guarantees shall be a first party direct guarantee from the Qualified Provider to the City. No third party guarantees for the above shall be accepted.
 - 6.3.2. Both of the following options must be available by the Qualified Provider:
 - 6.3.2.1. Option A: The Qualified Provider shall maintain a permanent full maintenance staff capable of fully maintaining all proposed equipment with emergency service in close proximity to Southfield.
 - 6.3.2.2. Option B: The Qualified Provider shall provide training and certification to City Maintenance staff so that the City can repair and maintain equipment in-house, while preserving any and all guarantees and warranties provided by the Qualified Provider.
 - 6.3.2.3. The Qualified Provider must provide a bid deposit equal to 5% of the proposal's principal amount. This deposit may take the form of a bond or a cashier's check made payable to the City of Southfield. A 100% performance bond will be required from the Qualified Provider upon award of the contract.
 - 6.3.2.4. The agreement shall be for a term of up to 15 years.
 - 6.3.2.5. The proposal shall include a maintenance plan for the term of the agreement.
 - 6.3.2.6. All work shall be performed in accordance with all applicable federal, state and local codes.
 - 6.3.2.7. The Qualified Provider shall provide improvements that are recognized and/or consistent with Leadership in Energy and Environmental Design for Existing Buildings (LEED-EB) Green Building Rating System, as much economically feasible.

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- 6.3.2.8. Each vendor must outline potential value-added services they could provide that would possibly benefit the City and the Greater Southfield Community.
- 6.3.3. Upon selection of the Qualified Provider, the City and the Qualified Provider will jointly develop a detailed evaluation and analysis of the City's needs as an aid to developing a final plan.
- 6.3.4. Each vendor must demonstrate a proven ability to provide maintenance, support and /or training of City of Southfield staff in order to keep equipment operational and generating the program expected results.

7. RFQ Response Contents

- 7.1. Please submit five (5) copies (one original and four copies) of your response. All proposals must contain the following information in the order listed below:
 - 7.1.1. Designation of Names: Responses must be dated and signed by a duly authorized officer of the company. Include your company's name, address, telephone and fax numbers, and email address.
 - 7.1.2. Qualifications: Identify and provide qualifications of all parties involved in the development of each phase of the program:
 - 7.1.2.1.1. Design
 - 7.1.2.1.2. Installation
 - 7.1.2.1.3. Maintenance
 - 7.1.2.1.4. Financing
 - 7.1.2.1.5. Energy and Operational Guarantees
 - 7.1.3. Provide resumes and background information for key personnel in your organization who will have direct involvement with this project.
 - 7.1.4. Experience:
 - 7.1.4.1. Completed Projects with Cities in Michigan over the past 5 Years:
Describe your experience on completed performance contract projects (as close in character to this project as possible) giving the following information on each project reported:
 - 7.1.4.2. Project name and location
 - 7.1.4.3. Project cost
 - 7.1.4.4. Project savings
 - 7.1.4.5. Actual work you performed
 - 7.1.4.6. Owner's name, address, telephone number and contract person.

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7.2. Financial Plan and Guarantee: Description of process utilized to determine the following:

- 7.2.1. Term of the Plan
- 7.2.2. Installed equipment cost (sample)
- 7.2.3. Maintenance cost and schedule (sample)
- 7.2.4. Source of funding/saving
- 7.2.5. Energy Resolution Bond or Lease requirements.

7.3. Technical Approach:

- 7.3.1. Description of methodology utilized to:
- 7.3.2. Develop energy conservation measures
- 7.3.3. Estimate equipment needs
- 7.3.4. Develop HVAC maintenance programs
- 7.3.5. Description of approach utilized to address the issue of indoor air quality and reduction of risk factors associated with “sick building syndrome”.
- 7.3.6. Description of recommended testing and verification methods and frequency.

7.4. Project Management:

- 7.4.1. List, by name, those individuals in your organization who would be assigned to work on this project in a management, engineering or job site administrative capacity. Provide an organizational chart to illustrate project organization and provide a biographical sketch of each person, including:
 - Education
 - Experience
 - Tenure with the company
- 7.4.2. Indicate the average number of personnel in your organization (branch office or regional office is sufficient) during the last twelve months.

7.5. Service Capabilities:

- 7.5.1. List trade categories in which your organization is legally qualified to do business.
- 7.5.2. List other types of services besides performance contracting your firm provides. (e.g. sub-contracting, design/build, architect-engineering, etc.)
- 7.5.3. Describe local service availability over the term of the contract.

7.6. Value-Added Services: Describe the various value added services you feel are available for the Southfield Community if you are selected as the Qualified Provider for the COS.

7.7. Project Implementation: Describe how you intend to implement the project and what measures you will take to plan the work and work the plan. If there are required inputs required by the COS please indicate the nature and scope of such inputs.

8. Obtaining Further Information

- 8.1. Additional information is available from Rae Townsel, Purchasing Agent, upon request, at 248.796.5250 or via email at rtownsel@cityofsouthfield.com. Office hours are Monday through Friday between 8:00am – 5:00 pm.

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