**Commonwealth of Massachusetts**

**Department of Energy Resources (DOER)**

Meg Lusardi, Acting Commissioner

**RFQ-ENE-2015-010**



**REQUEST FOR QUOTE**

**Consulting Services for Massachusetts Enterprise Energy Management System (EEMS)**

1. **Procurement Calendar**

|  |  |
| --- | --- |
| DOER Issues RFQ | September 3, 2014 |
| Deadline for Submitting Questions | September 10, 2014  |
| DOER Answers Questions  | September 16, 2014 |
| **RFQ Response Due** | **September 24, 2014** |
| Selection of Winning Response\* | October 3, 2014 |
| Execution of Contract with DOER\* | October 10, 2014 |
| Project Kick-off meeting\* | October 13, 2014 |
| PROJECT COMPLETE\* | April 15, 2015 |

\* Dates after RFQ Response Due date are *anticipated* dates. All dates are subject to change.

1. **Procurement and Contact Information**

**A. Type of Procurement**

Fee for Service subject to 801 CMR 21.

**B. RFQ Distribution Method**

This RFQ has been distributed electronically using the Commbuys system. It is theresponsibility of every potential respondent to check Commbuys for any addenda or modifications to an RFQ to which they intend to respond. The Commonwealth of Massachusetts and its subdivisions accept no liability and will provide no accommodations to respondents who fail to check for amended RFQs or submit inadequate or incorrect responses.

Respondents may not alter RFQ language or any RFQ component files. Those submitting a proposal must respond in accordance to the RFQ directions and complete only those sections that prompt a respondent for a response. Modifications to the body of this RFQ, specifications, terms and conditions, or which change the intent of this RFQ are prohibited. Any unauthorized alterations will disqualify a response.

**C. PRF46 - Management Consultants, Program Coordinators and Planner Services**

Work awarded as a result of this RFQ is pursuant to statewide contract PRF46 - Management Consultants, Program Coordinators and Planner Services. As such, all terms, conditions, contract rules, and pricing established in PRF46 shall apply.

**D. Future Bidding Provision**

Any firm or person awarded a contract under this RFQ or any firm or person that performs any work under this RFQ will be precluded from bidding on the proposed building energy intelligence Request for Responses (RFR) planned for later this year.

**D. Massachusetts Public Records Law**

All proposals and information submitted in response to this RFQ are subject to the Massachusetts Public Records Law, M.G.L., Chapter 66, Section 10, and to Chapter 4, Section 7, Subsection 26. Any statements in submitted proposals that are inconsistent with these statutes shall be disregarded.

**E. Small Business Procurement**

This is a small procurement targeted to small businesses participating in the Commonwealth's Small Business Purchasing Program (SBPP). EEA intends to evaluate bid responses from and to award a contract to a SBPP-participating business(es) who submit a bid that meets or exceeds the solicitation criteria only. If determined that there is inadequate SBPP capacity, or no SBPP-participating vendors provide a responsive bid, the Department will evaluate and award bid responses received from non-SBPP businesses. To determine eligibility and to participate in the SBPP, please review the requirements and general program information at [www.mass.gov/sbpp](http://www.mass.gov/sbpp).

**G. No Guarantee of Resulting Contract**

The Commonwealth makes no assurance that any services will be purchased from any contract resulting from this RFQ.

**H. Questions and Answers**

All questions must be submitted by email to the Procurement Contact listed below.

**I. Contact Information**

 Responses to this RFQ will be received by:

Procurement Contact: Andrea Hessenius

 Department of Energy Resources

 100 Cambridge Street, Suite 1020

 Boston, MA 02114

Telephone: (617) 626-7375

E-mail: MariaAndrea.Hessenius@state.ma.us

RFQ Name: Consulting Services for EEMS

RFQ File Number: RFQ-ENE-2015-010

All questions and answers will be posted periodically on the [DOER Grants and Contracts Webpage](http://www.mass.gov/eea/grants-and-tech-assistance/guidance-technical-assistance/agencies-and-divisions/doer/doer-procurements.html) at <http://www.mass.gov/eea/grants-and-tech-assistance/guidance-technical-assistance/agencies-and-divisions/doer/doer-procurements.html> and will be finalized on September 16, 2014.

1. **Introduction**

The Massachusetts Department of Energy Resources (DOER), hereinafter referred to as the Commonwealth of Massachusetts (the "Commonwealth",) is seeking to retain a qualified Consulting Firm (the “Consultant”) to provide research and consulting services to the Commonwealth related to the competitive procurement of and Enterprise Energy Management System for state facilities.

1. **Background**

Over the past several years, DOER’s Leading by Example Program has implemented a large-scale real-time metering effort - the *Enterprise Energy Management System* *(EEMS)* at state facilities. In partnership with DOER’s EEMS vendor, EnerNOC, the Commonwealth installed 1,281 building-level energy meters across 25 million square feet of state buildings that track and record 5 minute interval electricity, natural gas, steam, hot and chilled water, and oil usage. DOER and all project partners have web-based access to real-time data and analytical tools through the vendor’s platform. The project, financed by American Recovery and Reinvestment Act (ARRA) funds, was initiated as part of the Leading by Example program efforts to help agencies and colleges access building-level data, respond in real-time to data anomalies, compare building energy usage, target efficiency projects, and track energy usage and costs.

The EEMS contract expires on February 28, 2015 and DOER , with its partner agency, the Division of Capital Asset Management and Maintenance (DCAMM) are preparing to issue a competitive procurement for the next phase of EEMS in late fall 2014. DOER and DCAMM are interested in bringing on a consultant to assist with conducting market research, compiling a list of systems and capabilities that exist, evaluating the current EEMS system challenges and benefits, determining the scope and scale of the next phase, drafting and issuing a competitive solicitation, and assistance with reviewing proposals.

DOER is attaching the following files to provide additional background information:

1. Attachment 1: EEMS Overview Powerpoint
2. Attachment 2: EEMS Participant List
3. Attachment 3: EEMS Request for Information
4. Attachment 4: EEMS User Survey Questions
5. **Scope of Work**

The work under this RFQ shall include, but will not necessarily be limited to, the following:

* Market Research.
	+ Research and identify if other states have implemented similar programs and the software capabilities of those systems.
	+ Reviewing, analyzing, and summarizing responses to a Request for Information from energy management vendors. This may also include investigation of other vendor solutions that did not respond to the RFI; and
	+ Assist with compiling comprehensive list of energy management vendors, system capabilities, and contact information.
* Assessment of Current Challenges/Benefits.
	+ Reviewing, analyzing, and summarizing responses to DOER’s EEMS survey of EEMS users;
	+ Working with DOER, DCAMM, and users to understand and document the primary benefits and challenges of the current system;
	+ Develop recommendations for how to address challenges in the scope for the procurement documents; and
	+ Questions to address include, but are not limited to:
		- What level of data is appropriate (i.e. building vs. sub-metered loads vs. integration with building management systems, 5-minute vs. hourly vs. monthly)?
		- Where is EEMS data most effective (i.e. building type, use, size, operating schedule)?
		- How much and what kind of third party analytic support should be included in a new contract? Should the type and amount of support vary by agency?
		- What are the ways to reduce costs where appropriate (i.e. removing certain meters based on low energy usage, no user participation, cost-effectiveness of metering certain fuels vs. others, etc.)
		- How can the RFR and ultimate contract ensure the greatest participation possible from staff at the various sites with access to energy data?
		- How should the Commonwealth structure requirements around commissioning and data quality?
		- What is the best procurement and contractual process?
			* Will vendors need to evaluate the existing meters and hardware systems? Will vendors need to be allowed to access sites?
			* What is a reasonable procurement and implementation schedule?
* Development of RFR (based on information collected in tasks 1 and 2 above).
	+ Draft and finalize, with DOER and DCAMM input, the competitive procurement documents (RFR), including, but not limited to, scope of services, cost estimates, implementation schedule, submission requirements, and evaluation criteria.
* Assistance with Proposal Review.
	+ With DOER and DCAMM input, develop evaluation criteria and scoring sheets for Procurement Management Team;
	+ Conduct initial review of proposal to evaluate for minimum requirements set forth in the Request for Responses; and
	+ Support Procurement Management Team with proposal review.
* Contract Development and Negotiations.
	+ Support as necessary the drafting of the contract between DCAMM and winning bidder;
	+ As requested, participate in contract negotiation meetings and complete revisions to contract based on those meetings; and
	+ Participate in kick-off meeting with vendor.
1. **DELIVERABLES**

Key deliverables to be completed by the selected consultant include:

* Draft and Final Report documenting findings of Market Research tasks defined above;
* Draft and Final Report documenting findings of Assessment of Current Challenges/Benefits defined in the scope of work above;
* Draft and Final Request for Responses;
* Draft and Final contract template;
* Weekly updates on progress to DOER and DCAMM; and
* Other deliverables as defined by DOER and selected consultant during kick-off.
1. **CONTRACT INFORMATION**

**A. Funding availability /duration of contract**

The maximum funding available under this RFQ is $50,000. The contract(s) awarded pursuant to this RFQ-ENE-2015-010 will likely be through April 15, 2015.

**B. Contract expansion**

If additional funds become available during the contract duration period, DOER reserves the right to increase the maximum obligation to the contract executed as a result of this RFQ-ENE-2015-010, with related additional tasks to be determined by mutual agreement consistent with the terms of statewide contract PRF46.

**C. Consultant’s responsibility and invoicing**

The selected consultant will be responsible for timely completion of the requirements described above. The selected consultant must assume overall responsibility for coordinating and completing all deliverables contained in the resultant contract. All invoices must be submitted to DOER on a schedule and in a format to be agreed upon by DOER and the selected consultant. Invoices shall include sufficient back-up documentation to support the amount being invoiced.

**D. The Commonwealth’s responsibility**

The Commonwealth's Project Manager will be responsible for overseeing and managing all tasks undertaken by the selected consultant, including but not limited to developing of a Statement of Work; reviewing, commenting and approving work plans and subsequent deliverables; coordinating with DOER and other program staff; approving invoices promptly; and reviewing and preparing work products for reports.

1. **PROPOSAL REQUIREMENTS**

Respondents to this Quick Quotes RFQ-ENE-2015-010must respond via the Quick Quote Response Form and must also submit an electronic proposal to Andrea Hessenius (MariaAndrea.Hessenius@state.ma.us) by 4:00 P.M. on **September 24, 2014**. Late proposals will not be accepted. Faxed proposals will not be accepted. Proposals should not be submitted in an elaborate format that includes expensive binders or graphics. Unnecessary attachments beyond those sufficient to present a complete, comprehensive, and effective response will not influence the evaluation of the proposal. Each page of the proposal should state the name of the bidder, and the page number.

Respondents must provide a schedule of activities, including key milestones and outcomes for the project. The schedule shall define a clear timeline for achieving the project objectives. Respondents must also provide a cost proposal, broken out by task.

Respondents must provide a narrative, not to exceed 10 pages, describing their proposed approach, qualifications, and experience (the page limit does not include resumes, schedule of activities, or cost proposal).

Respondents must provide project-based pricing instead of the maximum billing rates established in PRF46.  Consultants must include any and all ancillary services in the project price.  DOER under no circumstance will pay additional costs related to the project unless previously agreed to by both parties.

Proposals that include any partnerships or sub-contracting relationships must designate one party as the lead consultant and identify the team of subcontractors (collectively referred to as consultants).

1. **PROPOSAL EVALUATION**

The selected consultant needs demonstrate the experience, ability, and skills to complete projects of this type on time and within budget.

All proposals received by the due date and meeting the requirements established in this RFQ will be reviewed and evaluated by DOER and DCAMM staff. The evaluation will include, but will not be limited to, the following criteria:

1. **Completeness and clarity of the proposal:**

Respondent presents a plan of approach to achieve end deliverables that is very logical, well thought through, takes into consideration all stakeholders, and fully addresses all elements stated in the RFQ.

1. **Respondent’s experience with similar projects:**

Respondent has demonstrated experience working on projects of a similar type, including previous consulting work for government agencies and demonstrated background in energy management.

1. **Price**

Respondent presents a reasonable budget with expected hours of work broken down by major tasks and by personnel.