



Request for Qualifications
Facility Improvement Services

Date Issued: March 8, 2024

Date Due: March 22, 2024 at 4:00 PM local time

City of Riverside

5200 Springfield Street, Suite 100

Riverside, OH 45431

citymanager@riversideoh.gov

Table of Contents

1) Introduction.....	1
Project Overview.....	1
Current Facility Environment	2
General RFQ Guidelines	2
ORC 717.02.....	3
2) RFQ Submittal Requirements	4
Response Format	4
Cover Letter	4
Company Profile and References.....	5
Insurance and Bonding.....	6
Approach and Implementation.....	6
Template Agreement	7
3) Evaluation Criteria, Timeline, Disclaimers.....	8
Evaluation Criteria	8
Timeline	8
Disclaimers	9

1) Introduction

The City of Riverside (City) is located in Montgomery County, Ohio, adjacent to Wright Patterson Air Force Base, and contains approximately 9 square miles with a population of approximately 25,000 residents. Riverside is a Charter City operating under the Council-Manager form of government, consisting of six Councilmembers and a Mayor. The Council appoints a City Manager responsible for overseeing core functions, services, and day-to-day operations of City Departments including Administration, Community Development, Finance, Fire, Police, Law, and Public Services. The City employs approximately 74 regular full time and 20 regular part time employees.

Project Overview

The City requests proposals of qualifications for the identification of facility infrastructure improvements on a guaranteed performance-contracting basis in accordance with the City's municipal charter, ordinances, or any other existing authority, which is also consistent with Ohio Revised Code § 717.02. The City's goal is to select a qualified firm that will provide the final design, implementation, project management, performance monitoring and verification, and ongoing first party performance guarantee of facilities infrastructure improvements through one or more phases of work, to be implemented at the City's sole discretion.

The City's purpose of issuing this Request for Qualifications (RFQ) is to identify and select a qualified architect, professional engineer, energy services company, contractor, or other person experienced in the design and implementation of energy conservation measures and projects to implement one or more Facilities Infrastructure Projects at City-owned facilities.

Respondents must be competent, qualified, and capable of providing comprehensive building management and energy services, including but not limited to the performance of energy consumption audits; the design, selection, and installation of energy efficient systems; ongoing support and training services; assistance in securing financing related to energy efficiency projects; and a written guarantee of savings.

Respondents must demonstrate qualifications, experience, and capabilities to develop energy projects and programs that are technically sound, modern, and creative – projects which conserve energy, reduce maintenance costs, increase automation, address capital needs, and improve the functionality, resiliency and energy independence of City facilities.

The City expects to achieve the following goals and objectives by entering into a project with the selected firm:

- Reduce energy and operating costs
- Improve facility environmental conditions
- Improve maintenance and operation of facilities
- Provide better working conditions in facilities
- Preserve capital funds
- Increase facility resiliency

Current Facility Environment

The City desires to address infrastructure improvements within its buildings through one or more energy efficiency projects. The City currently operates multiple facilities but lacks a comprehensive facility management plan or program. Major facilities are illustrated on the following table:

Address	Est. Square Footage	Construction Period	Current Use
5100 Springfield St.	102,500	1984	Wright Point Office Park. Office space for lease to third-party tenants
5200 Springfield St.	47,700	1984	Wright Point Office Park. City Hall (first floor) and office space for lease to third-party tenants
1791 Harshman		1950s	Police and Fire Stations
1791 Harshman (rear)		1950s	Public Service facility
1081 Spinning		2003	Fire Station 6

General RFQ Guidelines

- The City’s goal is to implement a facilities infrastructure improvement program which may include, but is not limited to, the repair, upgrade, or modernization of existing heating, ventilating, air conditioning, lighting, roofing, mechanical systems, electrical systems, plumbing systems, and facility envelopes in accordance with relevant statutory and local legislative requirements.
- Each proposal will be reviewed to determine if it is complete prior to actual evaluation. The City reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially unresponsive to the RFQ.
- Each proposal shall address how the firm will arrange for or provide financing of projects.
- Responsive firms must have a minimum of fifteen (15) years in business as an energy service provider.
- 100% of savings are to be retained by the City.
- First party guarantee is required from the firm to the City. No third-party guarantee will be accepted.

- While the selected firm does not need to be accredited via the National Association of Energy Services Companies (NAESCO), such accreditation is preferred. A complete list of NAESCO companies can be found at <https://www.naesco.org/members/full> as well as accredited companies at <https://www.naesco.org/accredited-companies>.
- The City reserves the right to reject any or all submittals, and to award contract(s) to the respondent the City determines to be most qualified and in the best interests of the City.

ORC 717.02

The selection of a qualified firm under this RFQ will be based on the City's determination that the selected firm is qualified to prepare and implement an energy conservation plan which best meets the needs of the City. The City reserves the right to accept or reject any or all respondent submittals based on the City's sole determination of its own best interests and needs. The City shall not be required to select any respondent vendor based on low cost, payback, or other criteria not specifically listed within ORC § 717.02.

Pursuant to ORC § 717.02(C)(2)(b), the awarding of a contract to install energy conservation measures shall be conditioned upon a finding by the City that the amount of money spent on energy conservation measures is not likely to exceed the amount of money the City would save in energy, operating, maintenance, and avoided capital costs over the average system life of the energy conservation measures as specified in the energy conservation report.

After selecting a firm to implement its proposal, the City intends to negotiate a contract with such offeror, following its provision a report, consistent with ORC § 717.02(B), with due consideration given to the implementation of measures which the City believes to be the most likely to result in the greatest energy and operational savings and reduced future capital expenditures, considering the cost of the project and the City's ability to pay for the improvements with current revenues or by financing the improvements..

Following approval of the selected firm's proposed project or program and prior to execution of the project contract, the firm shall provide a fixed price contract for the proposed, detailed scope of work. The firm shall also document energy and operational savings for the final contract.

The firm shall also document the savings methodologies utilized and measurement approach(es) selected (by mutual agreement with the City) by building or energy conservation measure. Change orders may be acceptable based on mutually unforeseen conditions, for additional scope of work requested by the City, or for hidden or latent items not contemplated during project development; provided, however, the selected firm's scope of work shall be well-defined such that change orders are the exception and not the rule.

2) RFQ Submittal Requirements

The City must receive responses to this RFQ no later than the date and time specified on the cover of this RFQ. Proposals received after the due date will not be accepted. No additional time will be granted to any vendor unless by addendum to this RFQ. **Respondents must submit proposals digitally in PDF format, with the email subject “Facility Improvement Services” to the following address: citymanager@riversideoh.gov.**

It is the responsibility of the respondent to deliver the proposal in accordance with the instructions contained in this RFQ. Proposals dispatched, but not received by the City by proposal closing time, will not be considered.

Response Format

RFP responses should be organized in the following order:

1. Cover Letter
2. Company Profile and References
3. Insurance and Bonding
4. Approach and Implementation
5. Template Agreement

Respondents that deviate from this format may be deemed unresponsive. Submittals should be prepared simply, providing a straightforward, concise description of how the vendor will satisfy the requirements of this RFQ. **Elaborate promotional materials should not be submitted.** Emphasis in the submittals should be on completeness, clarity of content, and adherence to the presentation structure required by this RFQ and not on volume. Costs for developing responses to this RFQ are the obligation of the respondent and are not chargeable to the City. All submittals and accompanying documentation will become the property of the City and will not be returned.

The following sections provide additional detail on the major sections of each submittal and required content for each section.

Cover Letter

The Cover Letter should include a brief overview of the respondent’s submittal, and should be prepared in a manner that is easily understood by individuals not familiar with technical jargon. **Include the following elements:**

- Company name, address, and telephone number(s) of the firm submitting the proposal.
- Name, title, address, e-mail address, and telephone number of the person(s) to contact who are

authorized to represent the firm and to whom correspondence should be directed.

- Federal and state taxpayer identification numbers of the firm.
- Briefly state your understanding of the services to be performed and make a positive commitment to provide the services as specified.
- Provide information that demonstrates your firm's financial strength.
- The letter must be signed by a corporate officer or another individual who is legally authorized to bind the applicant to both its proposal and cost schedule.
- Those firms who identify themselves as NAESCO accredited shall provide a copy of their Certificate of Accreditation from NAESCO and the number of consecutive years their firm has been accredited by the NAESCO.

Company Profile and References

The Company Profile should provide an overview of the responding firm. **Include the following elements:**

- Provide a brief overview of your company. List your company's board of directors and corporate officers (CEO, CFO, COO, CIO, etc.). Include a short bio for each officer and board member. If your organization is a division of a larger organization, please also provide a listing of your division's officers and a short bio for each.
- Provide resumes for the designated Principal in Charge/Project Manager and staff that will work directly on this project. Include position in the company, years of service, comparable projects, current office location, and role of each team member. **Specific team member experience with municipal customers in Ohio is required. The project team should include multiple Ohio-licensed Professional Engineers.**
 - Subcontractors may be listed as team members, but must be clearly identified.
- Provide an organizational chart that illustrates the structure and roles of your project team members.
- Address the company's ability to fulfill the financial guarantee terms and duration of the contract, or the entire program, where multiple phases of work may be implemented.
- The City is seeking a vendor-neutral offering of goods and/or services. If your firm (including an affiliate organization such as a subsidiary, sister, or parent company) manufactures, sells, or otherwise distributes in commerce, equipment, materials, or other goods and/or services, list all such goods and services that you could propose to use or install on or about the City's facilities as a part of a potential project.
 - If your firm is selected to perform the project, you agree that by responding to this RFQ, you will promptly advise the City of any and all instances where you intend to purchase and install equipment, materials, goods and/or services through a separate organization which is affiliated with your firm. Such selected firm shall truthfully disclose to the City the increased financial benefits to the firm and/or affiliate organization associated with

delivering such equipment, materials, goods and/or services through such affiliate.

- Provide examples of at least three (3) comparable local government projects, including timeframe, budget, and a reference/key contact.
- If your company has had a contract terminated for default during the past five years, all such incidents must be described. Termination for default is defined as notice to stop performance due to the vendor's nonperformance or poor performance, and the issue was either (a) not litigated or (b) litigated and such litigation determined the vendor to be in default.
 - If default occurred, list complete name, address and telephone number of the party.
 - If NO such determinations for default have been experienced by your firm in the past five years, declare that.

Insurance and Bonding

- Provide evidence that prior to award of contract, your firm shall be able to provide a 100% project value performance bond for its faithful performance of installation of all measures contemplated by your firm.
- Provide a copy of the most recent audited annual report for your firm.
- Provide evidence of applicable insurance in types and amounts that are commercially reasonable and appropriate with minimum coverages and limits as follows:
 - Worker's Compensation (statutorily imposed minimum limits)
 - Commercial General Liability (\$2M single occurrence / \$4M annual aggregate)
 - Automobile Liability (\$1M annual aggregate)
 - Professional Liability (\$2M per claim / \$2M annual aggregate).

Approach and Implementation

- Responses should include a detailed approach to meeting the goals and objectives for the facilities. Provide an overview of the technical approach that is used to identify, evaluate, and recommend energy conservation measures.
- Provide a detailed description of the company's project management capabilities, approach, methods of contract management and control.
- Provide examples of energy-saving measures implemented and their application.
- Describe any other benefits your firm can bring to the energy services program.
- Provide a description of the methodology and process tools used by your firm to provide annual reconciliation statements, measurement and verification and any required on-going support services.
- Indicate any equipment maintenance service contracts that will be required by your firm as a condition of the energy services guarantee.

- Describe the sources and types of funding sources available to the City to implement this project. Indicate the prior use and experience with this method of funding and provide letters of commitment from the financing entity.

Template Agreement

Provide a proposed template contract or contracts that identify the general terms and conditions as well as other agreement provisions to be used in the development of the project and subsequent implementation of the approved project or program measures. The template contract shall be used to negotiate the final contract between the City and any selected respondent. The City reserves the right to negotiate any terms of the contract that are in the best interest of the City and in accordance with the statutory requirements of ORC § 717.02.

3) Evaluation Criteria, Timeline, Disclaimers

Evaluation Criteria

The City will consider the criteria listed below when evaluating submittals. These categories may not be weighted equally, but rather on importance and significance to the contemplated project or program, based on the City's good judgment and discretion. The City will select the responding firm that is deemed most qualified. In addition to any other criteria set forth in this document, and subject to the right of the City to reject any or all submittals, the City will award a contract, if at all, to the firm submitting the best submittal. The City, in its sole discretion, will determine the best submittal. In determining whether a submittal is the best, the City may consider the following criteria and such other criteria as it determines proper:

- Firm qualifications, including experience and work history, conduct and performance on previous contracts (and under other names), management skills, and ability to execute contracts properly. The respondent should have a record of consistent customer satisfaction and of consistent completion of projects, including projects which are comparable to or larger than the City's desired scope as articulated in this RFQ.
- The respondent's financial condition.
- Project team members' experience and references
- Technical approach/process methodology and financial approach
- Measurement and verification approach
- The respondent's compliance with federal, state, and local laws, rules, and regulations, including but not limited to Occupational Safety and Health Act, and the State of Ohio's Equal Employment Opportunity Commission requirements, as applicable.
- Other benefits and essential factors as the City may determine.

During evaluation, the City reserves the right, where it may serve the City's best interest, to request additional information or clarification from respondents, or to allow corrections of errors or omissions. Oral interviews may be conducted by the City for respondents with complete submittals who are shortlisted.

Submission of a proposal indicates acceptance by the respondent of the conditions contained in the proposal documents. There is no expressed or implied intent or obligation for the City to reimburse responding firms for any expenses incurred in preparing proposals. The City reserves the right to reject any or all proposals in whole or in part.

Timeline

The City intends to complete the selection process using the following schedule, but reserves the right to

adjust project timing and milestones as necessary. Any changes to the schedule will be posted on the City’s website.

Respondents shall provide any questions concerning this RFQ via email to the City’s point of contact listed on the cover page of this RFQ at least five (5) days before the submission deadline established herein. Answers to such questions will be communicated to all respondents at least three (3) business days prior to the to the response deadline noted herein.

Date	Project Milestone
March 8, 2024	Issuance of RFQ
March 22, 2024	RFQ Submittals Due
Week of April 1, 2024	Interviews
Week of April 8, 2024	Selection of Provider

Disclaimers

1. The City reserves the right to reject any and all submittals for failure to meet the requirements contained herein, to waive any technicalities, and to select the submittal which, in the City’s sole judgment, best meets the requirements of the project.
2. The City reserves the right to make an award without further discussion of the proposal submitted. **Respondents should not rely upon the opportunity to alter their qualifications during discussions.** The City shall not be bound or in any way obligated until both parties have executed a contract. The City also reserves the right to delay contract award and/or not to make a contract award.
3. The City further reserves the right to make such investigation as it deems necessary to determine the ability of respondents to furnish the required services, and respondents shall furnish all such information for this purpose as the City may request.
4. Respondents must specifically identify any portions of their submittals deemed to contain confidential/proprietary information or trade secrets. Those portions must be readily separable from the balance of the proposal. Respondents may be required to justify why the City of Riverside should not, upon written request, disclose such materials.