

REQUEST FOR PROPOSAL



Request for Proposal Smart Grid Planning Study

RFP# ELE/17-032
REQUEST FOR PROPOSAL

ISSUE DATE: May 5, 2017
TITLE: Smart Grid Planning Study
DUE: June 5, 2017 by or before 2:00 PM EST

ISSUING OFFICE: City of Ocala Procurement Department, Lisa Crouthamel, Sr. Procurement/Contract Analyst, 110 SE Watula Avenue, 3rd Floor, Ocala, Florida, 34471, lcrouthamel@ocalafl.org.

The City will receive submittals until the time and date cited above. Only submittals received electronically on www.bidocala.com by the correct time and date will be recorded. Proposer is to upload one (1) electronic submittal package on www.bidocala.com for evaluation.

Anti-Collusion Statement/Public Domain

I, the submitting proposer, have not divulged, discussed, or compared this Request for Proposals with any other proposer and have not colluded with any other proposer in the preparation of this proposal in order to gain an unfair advantage in the award of this contract. I acknowledge all information contained herein is part of the public domain as defined in the Public Records Act, Chapter 119, F.S.

IMPORTANT NOTE: Please see Section 6. Any bidder/proposer violating anti-lobbying will have their proposal rejected, and will not be considered further.

1. GENERAL INFORMATION

- 1.1 The City requests qualified firms to submit proposals and qualifications for consideration in the selection for Smart Grid Planning Study.
- 1.2 All terms and conditions of this request, any addenda, proposer's submissions and future negotiated terms are incorporated into the contract by reference as set forth herein.
- 1.3 All dates and information contained herein may be extended, changed, or updated within the listing at www.bidocala.com. **Proposers are responsible for verifying all listing information before submitting a proposal to the RFP.**

2. **INSTRUCTIONS TO RESPONDING FIRMS:**

- 2.1 All proposals must be electronically submitted by or before **2:00 p.m. EST** on **June 5, 2017**, at www.bidocala.com under the appropriate listing.
- 2.2 Proposals may not be submitted by any other means other than as described in Section 2.1. The City will not accept proposals sent by U.S. Mail, private couriers, fax or email.
- 2.3 Any proposals received after the stated time and date will not be considered.
- 2.4 **Selection may be made directly from the Request for Proposals.** Some or all of the responding firms may be requested to provide written or oral technical proposals, or both, for the ranking process. After the ranking of the proposers, the contract will be negotiated in accordance with Florida Statutes and this RFP.
- 2.5 All materials submitted as response to this RFP shall become the property of the City.

3. **TIME SCHEDULE**

- 3.1 The City will attempt to use the following time schedule which will result in selection of a proposer.

Description	Date
All written questions and inquiries are due by 5:00 PM EST	May 31, 2017
Proposals due by or before 2:00 PM EST	June 5, 2017
Evaluation Committee Meeting	TBD
Shortlisted Firms- Interviews/Presentations	TBD, if necessary
City Council Approval Date	TBD

NOTE: These dates are estimated dates only and subject to change.

Questions and requests for clarification regarding this Request for Proposal must be submitted electronically via www.bidocala.com. Responses will be made electronically and posted online. It is the responsibility of the proposers to check for updates.

4. **AWARD**

- 4.1 The City reserves the right to accept or reject any or all proposals.
- 4.2 The City reserves the right to waive any irregularities and technicalities and may, at its sole discretion, request a clarification or other information to evaluate any or all proposals.
- 4.3 The City will negotiate an agreement with the highest rated proposer. If an agreement cannot be reached with the highest rated proposer, the City reserves the right to negotiate

with the next highest proposer (or subsequent proposers) until an agreement is reached.

- 4.4 The City reserves the right, prior to City Council approval, to cancel or terminate this RFP, any negotiations, or the proposed agreement, without penalty.

5. INQUIRIES

- 5.1 Any and all questions must be submitted to the Procurement Department electronically via www.bidocala.com. Responses will be made electronically and posted online. It is the responsibility of the proposers to check for updates.
- 5.2 If necessary, an addendum will be posted on the www.bidocala.com website.
- 5.3 It is our standard policy no addendum will be issued later than three (3) calendar days prior to the date for receipt of proposals, except an addendum withdrawing the request for proposals or one which includes postponement of the date for receipt of proposals.
- 5.4 No verbal or written information which is obtained other than by information in this document or by addendum to this request will be binding on the City.

6. LOBBYING

- 6.1 PROPOSERS ARE HEREBY ADVISED THAT CONTACT IS NOT PERMITTED WITH ANY CITY PERSONNEL OR BOARD MEMBER RELATED TO, OR INVOLVED WITH THIS REQUEST. ALL ORAL OR WRITTEN INQUIRIES MUST BE DIRECTED THROUGH THE ASSIGNED PROCUREMENT PERSONNEL.
- 6.2 LOBBYING IS DEFINED AS ANY ACTION TAKEN BY AN INDIVIDUAL, FIRM, ASSOCIATION, JOINT VENTURE, PARTNERSHIP, SYNDICATE, CORPORATION, AND ALL OTHER GROUPS WHO SEEK TO INFLUENCE THE GOVERNMENTAL DECISION OF A CITY COUNCIL MEMBER OR ANY CITY PERSONNEL AFTER ADVERTISEMENT AND PRIOR TO THE CITY COUNCIL VOTE ON THE AWARD OF THIS CONTRACT.
- 6.3 ANY PROPOSER OR ANY INDIVIDUALS THAT LOBBY ON BEHALF OF PROPOSER DURING THE TIME SPECIFIED WILL RESULT IN REJECTION / DISQUALIFICATION OF SAID REQUEST FOR PROPOSALS.

7. CITY OF OCALA PROTEST POLICY

7.1 ANY PROPOSER WHO IS ADVERSELY AFFECTED BY THE RECOMMENDED AWARD MAY FILE A PROTEST WITHIN THE TIME PRESCRIBED IN THE CITY OF OCALA PROCUREMENT POLICY LOCATED AT <http://www.bidocala.com/vendor-resources/>. FAILURE TO POST BOND WITH THE CITY OR TO ADHERE STRICTLY TO THE REQUIREMENTS OF STATUTES AND CITY OF OCALA RULES PERTAINING TO PROTESTS WILL RESULT IN SUMMARY DISMISSAL BY THE CHIEF FINANCIAL OFFICER FOR THE CITY.

8. **PREPARATION AND SUBMISSION**

Proposer's response shall be **no more than twenty (20) pages, excluding** front covers, and a cover letter of up to two (2) pages. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered. Proposals failing to provide sufficient information and assurances of performance to accurately assess each category below, or which fail to comply with the requirements and conditions of the Request for Proposals will not be given further consideration.

At a minimum, the proposal shall include the following sections:

- A. **Proposer Information:** Name of the proposer, address, principals, telephone number, email address and taxpayer ID number. Include a brief history of the firm.
- B. **Qualifications and Experience:** Provide qualifications, resumes, and experience of the team for this project based on the elements of this RFP. Emphasize the specific qualifications and experience from projects similar to this project for the key team members including references and project descriptions. Identify and provide in-depth information for the proposed project manager's qualifications, track record and relevant experience.
- C. **References:** Submit a minimum of three (3) references with names, titles, mailing addresses, email addresses, telephone numbers, and the project description. References should be from recent work performed similar to what is being proposed. Letters of Reference are preferred.
- D. **Staffing Plan:** Discuss Staffing Plan, workload, both current and anticipated, for all key team members, and their capacity to perform the requested services according to the proposed schedule. Specify the names of the persons who will be authorized to give and support information, both in writing and oral presentation, for your company. Provide their titles, addresses and telephone numbers.
- E. **Approach and Methodology:** Convey a clear understanding of the nature of the work outlined in **Exhibit A - Scope of Work**, and your methodology to accomplish it.

- F. **Project Schedule:** Include your proposed project schedule, identifying any critical paths, to accomplish the Scope of Work. Discuss the Team's approach for completing the services required for this project within budget and schedule.
- G. **Quality Control and Assurance:** Discuss Quality Assurance and Quality Control proposed for each phase/deliverable for this project.
- H. **Price Proposal:** Provide a detailed price proposal based on the Scope of Work.
- I. **Summary of Litigation:** Provide a summary of any litigation, claim(s), or contract dispute(s) filed by, or against, the proposer and all principals in the past three (3) years directly related to services related to this RFP that the proposer has been involved in. If no litigation, provide a statement to this effect.
- J. **Insurance:** Provide proof of your company's insurance as required in this request or submit a letter of your intention to have the required insurance within ten (10) days of notification by the City.

9. **PROPOSAL EVALUATION PROCESS**

- 9.1 The Selection Committee will be comprised of, at a minimum, three (3) members. The committee may consist of representatives from various and appropriate City departments, boards, and invited citizens.
- 9.2 The committee members will independently score and rank each responsive proposal received in accordance with the evaluation criteria. During the Selection Committee meeting, the committee members will review the proposals and will submit their rankings for compilation of the overall ranking to determine a shortlist.

At that time, dates may be set for conducting interviews with those firms remaining on the short list if there is not a clear #1 ranking. If shortlisted, firms will be notified either by email and/or telephone of the date and time. Presentation to the selection committee shall be made by the proposer's project manager and any others who will be directly involved in the development of these projects.

- 9.3 The Selection Committee reserves the right to interview any or all proposers and to require a formal presentation with the key people who will administer and be assigned to work on the project. This interview is to be based upon the written proposal received.
- 9.4 The Selection Committee shall negotiate further terms and conditions of an agreement with the highest ranked proposer. If the Selection Committee cannot reach a mutually beneficial agreement with the first selected proposer, the Committee reserves the right to

enter into negotiations with the next highest ranked proposer and continue this process until an agreement is reached or the City decides to terminate this RFP.

10. EVALUATION CRITERIA

The Selection Committee shall rank all proposals received, by ordinal rankings, which meet the submittal requirements. The following factors will be considered in ranking the responsive proposals received.

Criteria	Weight
Qualifications, Capabilities and Experience	40%
Approach, Methodology, Project Team and References	25%
Price Proposal	35%

11. CONFLICT OF INTEREST

11.1 All firms must list all and any affiliations they have with other firms.

11.2 The award hereunder is subject to the provisions of Chapter 112, Florida Statutes, as amended, governing conflict of interest. All proposers must disclose with each proposal the name of any officer, director or agent who is also a public or City employee. Further, all Proposers must disclose the name of any public employee who owns directly or indirectly an interest of five percent (5%) or more in the proposer's firm or any of its branches. City of Ocala municipal employees, appointed persons, and elected officials (herein referred to as "employees") may engage in outside activities and hold financial interests subject to the requirements of City of Ocala Employee Handbook regulations, state law, and federal regulations and law, if applicable. Every employee who is an officer, director, agent, employee, or owner of a substantial interest in any business entity which does or anticipates doing business with the City of Ocala ("City") must complete an "Officer and Employee Disclosure Statement" and file the statement with the required procurement documents submitted to the respective procurement staff member. A statement must be submitted with every procurement response if the proposer has a disclosure to document. This statement may be obtained at <http://www.bidocala.com/wp-content/uploads/Officer-and-Employee-Disclosure-Statement-and-Intro.pdf>

12. INDEMNIFICATION CLAUSE

The Proposer shall indemnify and hold harmless the City of Ocala and their elected officials,

employees and volunteers from and against all claims, damages, losses and expenses, including legal costs, arising out of or resulting from the performance of this contract, provided that any such claim, damage, loss or expenses is attributed to bodily injury, sickness, disease, personal injury or death, or to injury to or destruction of tangible property including the loss or loss of use resulting there from and is caused in whole or in part by any negligent act or omission of the Proposer.

13. DISADVANTAGED AND SMALL BUSINESS ENTERPRISE (DSBE) PARTICIPATION

The City encourages DSBE firms to compete for City projects, and also encourages non-DSBE proposers to use DSBE firms as sub-contractors. Use of DSBE sub-contractors is not mandatory but strongly encouraged. Proposers are required to indicate and submit their intention regarding DBE participation in the Sub-Contractor/Sub-Consultant Section. Proposers may also be required to complete a DBE Utilization form.

14. COST INCURRED IN RESPONDING

All costs directly or indirectly related to Request for Proposals preparation, representation or clarification shall be the sole responsibility of and be borne by the proposer.

15. EXHIBITS

Exhibit A - Scope of Work