

Energy Services Consultant for Local Government Operations

The Delaware Valley Regional Planning Commission (DVRPC), on behalf of Bucks, Chester, Delaware, and Montgomery counties (Entities), is seeking proposals from interested, independent, established and experienced vendors (Consultant) to provide technical, legal, and financial expertise to evaluate, educate on, recommend, and assist with implementing improved, long term strategies for electricity procurement and renewable energy procurement for local government operations. These strategies will leverage the aggregate electricity consumption of, at a minimum, Bucks, Chester, Delaware and Montgomery counties. As a part of this Request for Proposals (RFP) process, the selected Respondent may also contract directly with Counties as needed to provide Feasibility and Development services related to on-site energy generation and microgrids.

DVRPC Timeline for RFP Process:

Posting of Request for Proposal:	August 25, 2021
Submission of Inquiries by Email:	September 8, 2021 at 3:00 PM EDT
Posting of Responses to Inquiries:	Rolling basis
Technical Proposal Deadline:	September 20, 2021 at 10:00 AM EDT
Administrative Proposal Deadline:	September 20, 2021 at 10:00 AM EDT
Interview of Selected Respondents:	October 4, 2021 at 9:00 AM – 12:00 PM EDT (Virtual)
Anticipated Award of Project:	October – December 2021

The Delaware Valley Regional Planning Commission is the federally designated Metropolitan Planning Organization for the Greater Philadelphia region, established by an Interstate Compact between the Commonwealth of Pennsylvania and the State of New Jersey. Members include Bucks, Chester, Delaware, Montgomery, and Philadelphia counties, plus the City of Chester, in Pennsylvania; and Burlington, Camden, Gloucester, and Mercer counties, plus the cities of Camden and Trenton, in New Jersey. DVRPC's vision for the Greater Philadelphia Region is a prosperous, innovative, equitable, resilient, and sustainable region that increases mobility choices by investing in a safe and modern transportation system; that protects and preserves our natural resources while creating healthy communities; and that fosters greater opportunities for all.

DVRPC's mission is to achieve this vision by convening the widest array of partners to inform and facilitate data-driven decision-making. We are engaged across the region, and strive to be leaders and innovators, exploring new ideas and creating best practices.

DVRPC is funded through a variety of funding sources including federal grants from the U.S. Department of Transportation's Federal Highway Administration (FHWA) and Federal Transit Administration (FTA), the Pennsylvania and New Jersey departments of transportation, as well as by DVRPC's state and local member governments.

DVRPC serves strictly as an advisory agency. Any planning or design concepts as prepared by DVRPC are conceptual and may require engineering design and feasibility analysis. Actual authority for carrying out any planning proposals rest solely with the governing bodies of the states, local governments or authorities that have the primary responsibility to own, manage or maintain any transportation facility.

DVRPC fully complies with Title VI of the Civil Rights Act of 1964 and related nondiscrimination statutes in all activities. For more information, visit www.dvrpc.org/GetInvolved/TitleVI.

DVRPC, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252, 42 U.S.C. §§ 2000d to 2000d-4) and the Regulations, hereby notifies all bidders that it will affirmatively ensure that any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.

I. Project Background

Serving the Greater Philadelphia area since 1965, DVRPC works to foster regional collaboration in creating and maintaining a livable, sustainable, and economically competitive region covering our nine counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia counties in Pennsylvania, and Burlington, Camden, Gloucester, and Mercer counties in New Jersey. These nine counties together comprise over 3,800 square miles with land use that varies from the dense urban core of Center City Philadelphia to the open rural areas of the New Jersey Pinelands. DVRPC staff works with municipal, city, county, and state representatives and many other partners to improve transportation, promote smart growth, protect the environment, and build the economy.

DVRPC is the federally designated Metropolitan Planning Organization (MPO) for the greater Philadelphia region. DVRPC sponsors and conducts studies, assists member planning agencies, and provides a forum for interagency cooperation and public input into funding decisions. DVRPC was formed by an Interstate Compact through legislation passed by the Pennsylvania Legislature in 1965, as reenacted and amended in 1967, and by the New Jersey Legislature in a series of conforming acts passed between 1966 and 1974, which vests DVRPC with sovereign immunity.

The Southeastern Pennsylvania Regional Power Purchase Agreement Partnership (“Partnership”) is led and facilitated by the Delaware Valley Regional Planning Commission to support the counties of Bucks, Chester, Delaware, and Montgomery. For purposes of this RFP, the Partnership will represent DVRPC, Bucks, Chester, Delaware, and Montgomery counties.

Since mid-2020 the Partnership has met monthly to learn about and consider opportunities for the procurement of renewable energy for county operations, with a particular focus on physical and virtual off-site Power Purchase Agreements (PPAs). The Partnership has undertaken initial research to consider the benefits and implications of combining or aggregating the electric load of multiple counties, municipalities, and other institutions and authorities to explore the development of a large-scale renewable energy PPA that could cost-effectively provide all or a portion of the cumulative electricity load of the Partnership and additional contemplated members. The Partnership has learned from various cities, regions and institutions which included Philadelphia, Baltimore Regional Cooperative Purchasing Committee, (BRCPC), Western Pennsylvania Energy Consortium (WPEC) and Southeastern Pennsylvania Transit Authority (SEPTA)) about their efforts to procure electricity and renewable energy. The Partnership also participated in the [American Cities Climate Challenge Renewable’s Accelerator](#) Aggregation Cohort led by the Rocky Mountain Institute and World Resources Institute. Through this research, the group has learned how these cities, regions, and institutions have benefited from a long-term electricity procurement strategy that provides control, flexibility, transparency, cost savings, and the ability to procure renewable energy.

Now, DVRPC on behalf of the Entities is issuing this RFP to assist the Entities with achieving greater cost savings, improving flexibility and control of electricity purchasing, and increasing the use of renewable energy sources for local government operations. Ideally, the aggregation strategies proposed for both electricity procurement and renewable energy procurement can additionally leverage the electricity consumption of additional to-be-defined members including municipalities, and other institutions and authorities within each county as well. The goals and objectives and types of strategies to be evaluated are outlined below. The existing electricity procurement strategy explained below is a possible path forward for

the counties to continue to execute if it is deemed beneficial to do so through this evaluation process. If determined desirable by the Partnership, the Partnership will then seek for this consultant to assist with the development and execution of required steps to launch the preferred aggregated electric procurement strategy and/or renewable energy procurement strategy including the development of associated Memorandums of Understanding (MOUs), Requests for Information (RFIs), Requests for Proposals (RFPs), and contracts.

A. The goals for the electric aggregation strategies include:

- Low-cost electricity
- Long-term price stability to reduce the risk of market fluctuations on energy costs and provide budget certainty
- Increased transparency in the procurement process of electricity
- Ability to integrate renewable energy purchases into portfolio that meets many, if not all, of the enumerated goals for renewable energy procurement strategies listed below
- Ease of on-boarding additional to-be-determined members into aggregation approach. Categories of additional members may include:
 - Municipalities
 - Water/Sewer and other municipal authorities
 - School districts
 - Hospitals and universities and museums; and/or
 - Nonprofit organizations

B. The goals for the renewable energy procurement strategies include:

- Increased purchase of electric power for county operations from low-carbon and renewable electricity sources.
- Accelerated expansion of renewable energy power production facilities within Pennsylvania electricity markets and southeastern Pennsylvania, if possible.
- Ability to demonstrate leadership in the adoption and promotion of renewable energy.
- Meeting the stated and future climate goals adopted or expressed by or imposed upon Entities.
- Ability to cost-effectively pursue current and planned energy management strategies at county facilities.
- Achievement of long-term price stability to reduce the risk of market fluctuations on energy costs.
- Support of local workforce development and job creation in southeastern Pennsylvania.
- Leverage economies of scale in procurement and contracting in order to reduce the cost of developing renewable energy projects, particularly off-site PPAs.
- Reduction of greenhouse gas emissions and improve air quality.
- Development of renewable energy that is consistent with county and local land use plans and goals, that protects farmland and open space in Pennsylvania and that makes the best use of underutilized land where possible.
- Enhancement and preservation of the long-term value of county-owned facilities and assets.
- Ability to allow additional to-be-determined members to join into renewable energy procurement strategy.

C. The overall goals for the exploration of long-term electricity and renewable energy procurement strategies include:

- Increased understanding of energy markets and renewable energy procurement and the ability of Partnership members to effectively make decisions within these markets to achieve the electricity and renewable energy procurement goals stated above
- Establishment of a governance structure that allows Partnership members to effectively make decisions on electricity and renewable energy procurement and long-term strategy

D. Current County Electricity Procurement Strategy and Usage

The approximate combined electric usage in Bucks, Chester, Delaware, and Montgomery counties is 96.68 GWh annually (Bucks: 24.28 GWh, Chester: 22 GWh, Delaware: 26.7 GWh, Montgomery: 23.7 GWh). The counties have each entered into a fixed-price full requirements contract for electricity supply with WGL Energy through 2023 at a rate of \$0.04925/kWh. Bucks, Chester, Delaware, and Montgomery counties purchase Renewable Energy Credits (RECs) at a rate of \$0.00092/kWh. The counties are currently contracted with a broker who has served the counties since 2010 and, as broker, secures the fixed price retail electricity supply contracts for the counties through a competitive process whereby the broker aggregates the total electricity consumption of the four counties and other parties in order to achieve this rate. The counties do not directly manage this aggregation or procurement process.

II. Project Team, Management of Consultant, and Consultant Qualification Requirements

A. Project Team

The Project Team consists of dedicated staff from DVRPC and the Entities. The specific roles and responsibilities of DVRPC and the Entities are provided below.

DVRPC staff commits to:

- Serving as point of contact to the consultant for this project;
- Managing the consultant scope of work and its deliverables under the direction of the counties;
- Assisting with defining and facilitating data and information gathering needs between the consultant the counties;
- Assisting with defining and maintaining a project timeline;
- Providing assistance and facilitation with county decision-making points; and
- Assisting with outreach and facilitation to county-specific groups as needed (e.g. municipalities, schools, etc.).

County staff commits to:

- Providing all data and information (e.g. plans and studies) requested by the Consultant;
- Participating in project team meetings and one-on-one discussions with the Consultant;
- Providing regular feedback to DVRPC project manager on project scope, deliverables and timeline as requested by DVRPC;
- Facilitation, preparation, and providing logistical support for all county decision-making points; and
- Assisting with outreach and facilitation to county-specific groups as needed (e.g. municipalities, schools, etc.).

B. Management of Consultant

DVRPC will be financially responsible and pay for fees on behalf of the Entities. Each Entity has entered into an MOU with DVRPC and has made a financial contribution and is committed to the overall success of this project.

C. Consultant Qualification Requirements

The Consultant will have the following qualifications:

- Not a broker or supplier of electricity;
- Demonstrated legal and financial expertise necessary to assist with advising this group on all necessary cooperative procurement, contracting, negotiations, and development of governance structure;
- Demonstrated experience providing consulting to local governments (or other governments or institutions with similar procurement rules) on electricity procurement and renewable energy procurement. Strong preference given for Respondents with experience providing consulting to local governments or groups of local governments in Pennsylvania;
- Demonstrated experience advising on renewable electricity procurement decisions, successful negotiations on, and contracting, particularly for Power Purchase Agreements (preference given for experience with both physical and virtual PPAs);
- Demonstrated experience working on behalf of multiple entities;
- A broad base of knowledge of and analytical experience with energy markets, wholesale market purchasing, nodal pricing, the PJM market, PJM billing and account management.

All Respondents shall disclose any potential conflicts of interest arising from financial relationships with any Project Team member, potential developers, brokers, and electricity suppliers.

III. Scope of Work, Deliverables

The Consultant will be responsible for completing the following tasks and deliverables in order to evaluate, educate members on, recommend, and possibly assist with implementing improved, long term strategies for electricity procurement and renewable energy procurements. The work is separated into two levels of service: 1) **Level One: Regional Services** and 2) **Level Two: One-on-one Services** with each county. Within each level, the work is separated into two phases: 1) **Phase One: Feasibility** and 2) **Phase Two: Development**.

The primary scope of work for this RFP is at Level One. Level Two services may be elected by each individual county towards the conclusion of Level One, Phase One: Feasibility if it is determined that further execution of one-on-one services are deemed necessary by the county. All work that occurs at Level One will be under contract with DVRPC, and all work that occurs at Level Two will be under contract with each individual county. Counties may also procure Level Two or related services from other providers and are not required to use the Consultant for any directly contracted work.

- A. Level One: Regional Services** will evaluate ways to leverage the aggregate electric consumption of, and integrate renewable energy for at a minimum, Bucks, Chester, Delaware, and Montgomery counties.

i) **Phase One, Feasibility:** The Feasibility Phase tasks will include 1) baseline development, 2) financial, legal, and economic evaluation of aggregate electricity procurement and renewable energy procurement strategies available to the Partnership culminating in a final recommended strategy, 3) education of Project Team regarding energy markets, procurement best practices, and recommended and preferred strategies, and 4) pre-decision-making support for Project Team members. Tasks and deliverables are described further below. At the completion of this phase, the Project Team will decide whether to move on to the Development Phase of this scope of work in order to pursue the recommended strategy for electricity procurement and/or renewable energy procurement.

(1) Baseline Development: Review each existing county's electricity procurement strategy, existing or future plans for energy management or renewable energy integration into operations, and existing electricity usage to establish baseline.

(2) Financial, legal, and economic evaluation and recommendation of Long-term Aggregate Electricity Procurement Strategies and Renewable Energy Procurement Strategies: Prior to the start of the evaluation process, the Project Team will work with the Consultant to refine the strategies to be evaluated. During the evaluation process, the Project Team will work with the Consultant to define a final recommended plan for change or maintenance of an aggregate electric procurement strategy and integration of renewable energy procurement into recommended strategy.

The long-term aggregate electricity procurement strategies to be evaluated include, at a minimum: 1) maintenance of current retail electricity and REC purchasing strategy, 2) implementing a reverse auction, 3) developing a subaccount within the Pennsylvania, New Jersey, Maryland (PJM) Regional Transmission Organization in order to purchase electricity on the wholesale market, and 4) aggregation with the Commonwealth of Pennsylvania via the existing COSTARS electricity procurement program.

The Respondent's proposal should indicate any additional electric procurement strategies that should be considered, as long as they meet the goals stated in Section I Project Background of this RFP.

The types of renewable energy procurements to be evaluated for ease of inclusion within the electricity procurement strategies listed above include: off-site Physical PPAs, Virtual PPAs, or other applicable renewable energy offtake agreement that meets the goals stated above.

The Respondent's proposal should indicate any additional renewable energy procurement strategies that should be considered, as long as they meet the goals stated in Section I Project Background of this RFP.

Respondents are encouraged to be transparent in their proposals about any preferred aggregate electricity and renewable energy procurement strategies that they may have.

The suggested elements of this evaluation include:

- An explanation of how each electricity and renewable energy procurement strategy does or does not meet the goals stated in Section I Project Background of this RFP. A goal alignment exercise should be conducted with Project Team members to explore how the goals stated in Section 1 of this RFP can be prioritized, refined, and achieved through an aggregate electricity procurement and renewable energy procurement strategies.
- An economic modeling analysis to back up any claims of long-term financial benefit from proposed strategies.
- Each strategy evaluated should identify the advantages and disadvantages including any potential barriers to, risks of, and/or any legal or regulatory restrictions that may arise relative to implementation.
- The renewable energy strategies identified should be presented in terms of their feasibility and methods for integration into the aggregate electricity procurement strategies proposed. Ideally, the proposed renewable energy strategy will define the type (e.g. physical/virtual PPA) and size (as a percentage of consumption) that could be pursued by the Entities.
- The electricity and renewable energy procurement strategies should be evaluated in terms of the ability to on-board additional members. The final proposed strategy should outline how to on-board additional members to the strategies proposed.
- An on-going governance and management structure to maintain the proposed electricity procurement and renewable energy procurement strategy should be defined and proposed as part of the evaluation process.

(3) Educate the Project Team: Educate on recommended long-term electricity procurement strategies, electricity markets and procurement best practices through memos, presentations, and one-on-one discussions. Educate members on off-site renewable energy procurement best practices with a particular focus on solar, wind, and other renewable energy technologies that will allow local governments to meet long-term carbon reduction goals and what is possible in PJM and Pennsylvania.

(4) Assist the Project Team with pre-decision making steps towards pursuing recommended strategy: These steps include 1) the planning of a procurement process and timeline, 2) development of required materials needed to educate county elected officials, additional partnership members (e.g. municipalities, authorities, schools, etc.), and 3) providing initial legal support to Partnership solicitors as needed.

(5) Feasibility Phase Deliverables:

1. Brief technical evaluation report or memo that summarizes the evaluation research conducted above and clearly explains rationale for the final recommended plan for change or maintenance of an aggregate electric procurement strategy and integration of renewable energy procurement into recommended strategy. Format and final report will be facilitated by the Project Team's Point of Contact.
2. Educational memos, presentations, and one-on-one discussions related to electricity and renewable energy procurement strategies

3. Regular meetings with Project Team to support development and understanding of tasks
 4. Meetings as needed with Point of Contact to support development and understanding of tasks
 5. Prepare for, attend and possibly present at public meetings and information sessions for Partnership decision makers.
- ii) **Phase Two, Development:** If the Partnership members decide to proceed beyond Feasibility phase, the Development phase tasks will include assistance with the development, selection and on-going management of required solicitations, contracting, MOUs, and governance structure necessary to pursue desired strategies for electricity and renewable energy procurement. The Respondent will provide technical, legal, financial, and procurement guidance to the Partnership throughout the implementation of the strategies for the following list of tasks and deliverables.
- (1) **Procurement and Contracting – Electric Aggregation:** Assist with development, selection, negotiation, and on-going guidance of required solicitations, contracting and MOUs necessary to pursue desired electric procurement strategy.
 - (2) **Governance Support:** Assist with development and proposal of effective governance for on-going maintenance and management of electric aggregation strategy.
 - (3) **Decision-making Support – Electric Aggregation:** Provide decision-making support to Partnership members including 1) development of required materials needed to educate county elected officials, and additional partnership members (e.g., municipalities, authorities, schools, etc.), 2) Providing legal support to Partnership member’s solicitors as needed.
 - (4) **Procurement and Contracting – Renewable Energy:** Assist with development, evaluation/selection, negotiation, and on-going guidance of required solicitations, contracting and MOUs necessary to pursue desired renewable energy strategy.
 - (5) **Decision-making Support – Renewable Energy:** Provide decision-making support to Partnership members including 1) development of required materials needed to educate county elected officials, and additional partnership members (e.g. municipalities, authorities, schools, etc.), 2) Providing legal support to Partnership member’s solicitors as needed.
 - (6) **Development Phase Deliverables:**
 1. Drafts of necessary RFIs and/or RFPs.
 2. Technical and legal support in development of contracts, resolutions, and MOUs
 3. Advisement on and support on establishing and implementing governance process to maintain the strategy
 4. Technical evaluation memo analyzing responses to RFIs and RFPs
 5. Interviews with project developers
 6. Negotiations with project developer to finalize cost, risk alignment, billing, contract terms and any other necessary elements.
 7. Meet regularly with project team to support development and understanding of tasks
 8. Meet as needed with Point of contact to support development and understanding of tasks.
 9. Prepare for, attend, and possibly present at public meetings and information sessions for Partnership members decision makers.

- B. Level Two, One-on-One Services:** will allow each county to evaluate procurement or implementation pathways for on-site renewable energy generation at county owned sites or facilities and the use of the power generated for general load requirements within the county or for the formation of a microgrid to power critical infrastructure. At their discretion, each county may contract with the selected Respondent to provide feasibility and development services for on-site renewable energy generation and microgrid potential.
- i. **Phase One, Feasibility:** Tasks include evaluating existing plans, studies, or public proposals prepared by or for the county to evaluate on-site generation and microgrid potential and determining 1) a feasible procurement plan for each strategy (or recommendation against), 2) integration of the implementation scenario of procurement strategy into the overall Partnership Electricity and Renewable Energy procurement strategy; and 3) related tasks and services. At the completion of this phase, the Entity will decide whether to move on to the Development Phase of this scope of work in order to pursue the recommended strategy for renewable energy procurement. Tasks and deliverables are listed below.
 - (1) **Baseline development:** Baseline development includes the familiarization of existing plans or studies and a scoping meeting with the county to understand procurement priorities.
 - (2) **Financial, legal, and economic evaluation of on-site renewable energy procurement or implementation strategies.**
 - (3) **Education** of Entity on proposed procurement or implementation strategy, and
 - (4) **Pre-decision-making support for Project Team members.**
 - (5) **Feasibility Phase Deliverables:**
 1. Brief technical evaluation report or memo that summarizes the evaluation research conducted above and clearly explains rationale for the final recommended plan for on-site generation or microgrid procurement strategy.
 2. Educational memos, presentations, and one-on-one discussions related to recommended procurement.
 3. Meetings as needed with Point of Contact to support development and understanding these deliverables
 4. Prepare for, attend and possibly present at public meetings and information sessions for Entity's decision makers.
 - ii. **Phase Two, Development:** If the county decides to proceed beyond Feasibility, the Development Phase of services will include assistance with the development, selection and on-going management of required solicitations, contracting, necessary to pursue desired on-site renewable energy procurement strategy pursuant to a separate contractual arrangement with each County. The Respondent will provide technical, legal, financial, and procurement guidance to the county throughout the implementation of the strategies. Tasks and deliverables are listed below.
 - (1) **Procurement and Contracting:** Assist with development, selection, negotiation, and on-going guidance of required solicitations and contracting necessary to pursue desired renewable energy procurement strategy.

(2) Decision-making Support: Provide decision-making support to Entities including 1) development of required materials needed to educate county elected officials, and additional partnership members (e.g., municipalities, authorities, schools, etc.), 2) Providing legal support to Partnership solicitors as needed.

(3) Development Phase Deliverables:

1. Drafts of necessary RFIs and/or RFPs.
2. Technical and legal support in development of contracts, resolutions and MOUs
3. Technical evaluation memo analyzing responses to RFIs and RFPs
4. Interviews with project developers
5. Negotiations with project developer to finalize cost, risk alignment, billing, contract terms and any other necessary elements.
6. Meet regularly with project team to support development and understanding of tasks
7. Meet as needed with Point of Contact to support development and understanding of tasks.
8. Prepare for, attend and possibly present at public meetings and information sessions for Partnership members decision makers.

IV. Submission Information

Technical and Administrative Proposal submissions are due no later than **10:00 AM EDT on Monday, September 20, 2021**. Please note that file sizes must be under 25 MB. Acceptable file types are .pdf, .doc, and .docx.

Proposals submitted after the submission deadline, or that do not strictly adhere to the submission instructions, or that are non-responsive to any of the requirements of this RFP may be deemed disqualified and may be ineligible for award.

V. Technical Proposal Requirements

The proposal, transmitted as a .pdf, .doc, and/or .docx file should contain the firm name and be titled "Technical Proposal." **Please submit your Technical Proposals via email to procurement@dvrpc.org**. The firm who submits the proposal, Respondent, must include the following elements in order:

- B. Cover letter** from a principal of the Respondent, providing summary of proposed solution of the project, along with primary contact information (phone number and email address). **(1 page recommended maximum)**
- C. Consultant Team Description** including qualifications, relevant experience, and contact information for each team member. Please explain how your team meets the qualifications listed in Section II of this RFP. Please identify the project manager, key personnel, and any sub-consultants, and include an organizational chart of the project team, if available. If team of consultants, explain how team may have previously worked together. Please identify the team leader who will interface with the Project Team and provide specific pertinent background on that individual and those who will assist her/him/them. Respondents shall disclose any potential conflicts of interest arising from financial relationships with any Project Team member, potential developers, brokers, electricity suppliers or local governments. **(5 page recommended maximum)**

- D. Detailed Summary of Experience** related to the type of Energy Services Consulting described in this RFP. Possible elements can include methods, size and/or number of local governments or parties served, project's beginning and end dates, project results, explanations of significant delays, and lessons learned. Respondents should provide a list of electricity procurements and renewable energy procurements (including PPAs) completed, negotiated in the past five years including the size of those procurements, role as consultant, and the type of client served. Provide up to five one-page descriptions of projects that have been completed in the past five years. Project descriptions should include a description of project, time period, location, and contact information. **(8 page recommended maximum)**
- E. References** from clients representing the projects highlighted in Detailed Summary of Experience indicating whether the work was that of the Respondent and/or specific staff who will be assigned to the Project. Identify the client contact name, organization, type of work provided, and the contact's address, telephone number and e-mail (if applicable). Provide three references. **(3 page recommended maximum)**
- F. Proposal Narrative** providing sufficiently detailed information of project methods and discussion of their approach so that the Respondent's competence and ability to provide the required deliverables of task and products is clearly demonstrated. The narrative should specify which tasks will be done by the lead consultant and which tasks will be done by sub-consultants, if applicable. Respondents are invited to present alternative methods that would enhance the deliverables or shorten the time required to complete the deliverables. The proposal narrative outline should align with the Scope of Work outline provided in this RFP, with any alternative methods clearly identified within that outline. As stated in Section III Scope of Work, the Respondent's proposal should indicate any additional electric aggregation and/or renewable energy procurement strategies that should be considered, as long as they meet the goals stated in Section I of this RFP, and Respondents are encouraged to be transparent in their proposals about any preferred aggregate electricity and renewable energy procurement strategies that they may have. **(8 page recommended maximum)**
- G. Detailed Project Schedule** outlining the Respondent's proposed sequence and timing of activities. The Project Schedule should be organized in alignment with the Scope of Work provided in this RFP. **(1 page recommended maximum)**

Please Note: All Technical Proposals are to be sent via e-mail separate from the Administrative Proposal to procurement@dvrpc.org.

VI. Administrative Proposal Requirements

The proposal, transmitted as a .pdf, .doc, and/or .docx file should contain the firm name and be titled "Administrative Proposal." **Please submit your Administrative Proposals via email to slee@dvrpc.org. The Administrative Proposal should contain elements A through C:**

- A. Certification of Eligibility** – A certificate is to be included in the proposal for each firm stating that: "The firm is not ineligible to receive award of a contract due to the firm's inclusion on any Federal, Pennsylvania, or New Jersey state lists of debarred contractors, or otherwise ineligible to be awarded a contract using Federal or state funds." This statement should be written on your firm's letterhead

and should be signed by an officer of the firm.

- B. DBE/SBE Letters** – If applicable, the Respondent and/or any sub-consultants must submit letters demonstrating that they are certified as a DBE/SBE firm by the Commonwealth of Pennsylvania and/or New Jersey.
- C. Project Cost Budget** – Respondent will be asked to provide a detailed project cost budget estimate utilizing the schedule attached to this RFP. Please see Attachment A: Contract Pricing Proposal. A separate detailed budget is to be prepared by the Respondent and each subconsultant. During negotiations, the Respondent or DVRPC may suggest that deliverables or tasks be modified or deleted. Please note that Title 41 Code of Federal Regulations limits the amount of profit or fee to 10 percent of the direct labor and indirect costs.

Please Note: All Administrative Proposals are to be sent via e-mail separate from the Technical Proposal to the attention of Sonia Lee, at slee@dvrpc.org.

VII. Evaluation Criteria

An evaluation committee consisting of Project Team members including DVRPC, Bucks, Chester, Delaware, and Montgomery Counties staff will evaluate each proposal properly submitted and, at its discretion, recommend an awardee or awardees to the DVRPC Board.

Criteria have been established to guide the evaluation of each Respondent's proposal. The following weighted criteria will be used to evaluate and rank proposals:

- A. Technical approach and project understanding (weight 40%):** Respondents should clearly detail their methods and approach to the project. Respondents are encouraged to offer suggestions for enhancing specific tasks or the overall work and/or propose innovative techniques to improve the results of this analysis.
- B. Professional qualifications and experience in similar work (weight 40%):** Respondents should demonstrate their qualifications and experience as it relates to carrying out the project.
- C. Proposed project schedule (weight 20%):** Demonstrated ability to propose a timeline that will lead to the successful completion of the project and demonstrated past experience executing similar projects in accordance with the proposed schedule in a timely fashion.

Negotiations for award of the contract will be to the Respondent that best meets the evaluation criteria of this RFP process. DVRPC reserves the right to award in part or as a whole. DVRPC may reject all proposals. DVRPC further reserves the right to negotiate cost and scope elements with the leading Respondent(s).

VIII. Interview/Presentations

Respondents who submit top-ranking proposal(s) will be invited to participate in a mandatory virtual (via Zoom) fifty-minute (50 mins.) interview with the selection committee on Monday, October 4th, 2021 between 9:00 AM – 12:00 PM EDT. Power Point Presentations will be required. Interview presentations will be a part of the overall evaluation of the Respondents. As Interviews will be mandatory for those who are invited, Respondents are required to hold the date and time that is scheduled for this interview.

IX. Contract

The contract will be between DVRPC and the selected Respondent who will be technically and administratively responsible to DVRPC and the Entities. DVRPC will authorize all payments to the selected firm(s). The contract will be cost reimbursable with a fixed fee, not to exceed type.

Length of contract and availability of funds will be provided in the contract details. Should additional funding become available for related work DVRPC may negotiate with the selected Respondent to perform the work for up to four additional one-year periods.

X. Inquiries Regarding this Solicitation

All inquiries related to this RFP should be directed to procurement@dvrpc.org and submitted no later than **Wednesday, September 8, 2021 at 3 PM EDT**. Inquiries may not be considered if not received by then. DVRPC will respond to questions it considers appropriate to the RFP and of interest to all Respondents, but reserves the right, in its discretion, to amend or to not respond to any question.

All inquiries and responses will be posted on a rolling basis on the DVRPC website at the location of the posting of the original RFP at www.dvrpc.org/business/.

Responses posted on DVRPC's website become part of the RFP upon posting. DVRPC reserves the right, in its discretion, to revise questions and responses to questions after posting, by posting the modified response. No oral response to any Respondent question by any DVRPC employee or agent shall be binding on DVRPC or in any way considered to be a commitment by DVRPC.

DVRPC considers any information submitted directly to the Commission through a notice of opportunity announcement to be confidential and proprietary. While DVRPC does not make such information public, unsuccessful Respondents may request a debrief meeting to discuss their submission and subsequent evaluation. DVRPC's Access to Records Policy may be viewed at www.dvrpc.org/Policies.

XI. Disadvantaged Business Enterprises

The Delaware Valley Regional Planning Commission is committed to providing opportunities for Disadvantaged Business Enterprises (DBE) to compete for work. DBEs are certified by the Pennsylvania Unified Certification Program (PAUCP) and the New Jersey Unified Certification Program (NJUCP) in accordance with 49 CFR Part 26. Any party that enters into an agreement with DVRPC is encouraged to involve DBEs in the required work and to submit documentation of any such involvement in the proposal narrative and budget.

For this project, the DBE/SBE goal shall be a minimum 10%.

Any party that enters into an agreement with DVRPC shall not discriminate on the basis of race, color, national origin, or sex in the award and performance of any agreement or in the administration of its DBE program or the requirements of 49 CFR part 26. All parties to DVRPC agreements shall take all necessary and reasonable steps under 49 CFR part 26 to ensure nondiscrimination in the award and administration of any subagreements and in addition each prime contractor or subrecipient must include the following assurance in any subcontracts entered into:

“The contractor, subrecipient or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The contractor shall carry out applicable requirements of 49 CFR part 26 in the award and administration of this agreement.”

DVRPC Disadvantaged Business Enterprise Policy: www.dvrpc.org/Consultant/files/dbe_program.pdf

DVRPC encourages all prospective Respondents to use the following links to the PA and NJ Unified Certification Program to locate DBE firms to utilize as sub-consultants.

PA - Unified Certification Program: <https://www.penndot.gov/about-us/EqualEmployment/Pages/UnitedCertificationProgram.aspx>

NJ - Unified Certification Program: www.njucp.dbesystem.com

Submission Requirements

The Respondent, using the attached DBE Participation Schedule (Attachment B), is required to furnish the following documentation as part of its technical proposal:

- The names and addresses of DBE firms that will participate in the Contract;
- A description of the work that each DBE will perform; and
- The percentage of participation of each DBE firm participating.

XII. Small Business Enterprise & Emerging Small Business Enterprise Programs

In addition to DBEs, DVRPC encourages the use of small businesses under the following programs: Small Business Enterprise (SBE) in Pennsylvania, and Emerging Small Business Enterprise (ESBE) in New Jersey.

Small business concerns are those entities seeking to participate in contracts that meet the definition of a small business concern set forth in Section 3 of the Small Business Act and Small Business Administration regulations as per 13 CFR Part 121.

These programs are designed to facilitate greater participation of small businesses in transportation related procurements. Any party that enters into an agreement with DVRPC is encouraged to involve SBE/ESBEs in the required work and to submit documentation of any such involvement in the proposal narrative and budget.

Contractors looking for certified SBEs can search these online databases:

Pennsylvania Small Business Enterprise Program: www.dotsbe.pa.gov/SBEWeb/sbe/viewHome.do

New Jersey Emerging Small Business Enterprise (ESBE) Program:
www.nj.gov/transportation/business/civilrights/pdf/ESBEDirectory.pdf

Contractors must maintain records to ensure compliance with 49 C.F.R Part 26 obligations by indicating the number of DBE, SBE/ESBE, and non-DBE/SBE/ESBE subcontractors, the type of work performed on the project, documentation of efforts to secure DBE/SBE/ESBE firms for available subcontracting opportunities and the means of communication used to obtain the services of DBE/SBE/ESBEs, and dollar amounts paid to DBE/SBE/ESBEs.

ATTACHMENT A

Contract Pricing Proposal Sample

This chart is intended to be illustrative as to how the Respondent may wish to cost out its services. The chart is structure relative to the phases and tasks outlined in the scope of work for this RFP. Respondents may depart from this proposed chart by adding requirements from this RFP, adding proposed additional tasks, or by dividing an Item described below into sub-items. Respondent must provide a Not to Exceed amount for Feasibility services (Level One and Level Two). Respondent must provide an hourly-based price proposal for Development Services. Respondents must also provide budget detail indicating the staff assigned to each task including their title and fully loaded hourly rate.

Respondent Price Proposal		
Phase 1: Feasibility		
Level One Services. Tasks include 1) Baseline Development; 2) Financial, legal, and economic evaluation and recommendation of Long-term Aggregate Electricity Procurement Strategies and Renewable Energy Procurement Strategies.; 3) Educating the Project Team, and 4) Pre-decision making support.		
Level Two Services Tasks include 1) Baseline Development; 2) Financial, legal, and economic evaluation and recommendation of Renewable Energy Procurement or Implementation Strategies.; 3) Educating the Project Team, and 4) Pre-decision making support.		
Level One Feasibility NTE Amount	\$	
Level Two Feasibility NTE Amount	\$	
Development		
Electric Aggregation		
Task	Hourly Rate	Estimate # of Hours
Development, selection, negotiation, and on-going guidance of required solicitations, contracting and MOUs necessary to pursue desired electric procurement strategy.	\$	
Development and proposal of effective governance for on-going maintenance and management of electric aggregation strategy.	\$	
Decision-making support to Partnership members including 1) development of required materials needed to educate county elected officials, and additional partnership members (e.g. municipalities, authorities, schools, etc), 2) Providing legal support to Partnership solicitors as needed.	\$	
Renewable Energy Procurement		
Task	Hourly Rate	Estimate # of Hours
Assist with development, evaluation/selection, negotiation, and on-going guidance of required solicitations, contracting and MOUs necessary to	\$	

pursue desired renewable energy strategy.		
Provide decision-making support to Partnership members	\$	
Level Two One-on-One County Development Services	\$	
Total NTE Amount for Development	\$	

ATTACHMENT B

Disadvantaged Business Enterprise (DBE) Participation Schedule

As specified in the DBE Participation Section included in the Request for Proposal Documents, the Proposer shall furnish to DVRPC's satisfaction the details of disadvantaged business enterprise participation.

Table I: All Work to be Performed by DBEs

Name of DBE Firm	Contact Person (Business Address & Telephone Number)	Description of Work to be Performed	Total DBE Agreed Percentage to be Credited to DBE Goal
			%
			%
			%
			%

Project Name: _____

Name: _____

Title: _____

Firm or Corporation: _____

Email: _____

Telephone Number: _____

Proposers are hereby notified that the information contained herein will be verified with the designated DBE firm. Additionally, if and when the award of a contract is made, all DBE firms listed herein will be simultaneously notified of the award. DVRPC reserves the right to waive informalities herein in its sole reasonable discretion. All percentages must be expressed as a percentage of the Proposer's total maximum price to DVRPC.

Signature: _____ Date: _____