Request for Qualifications
RFQ763-18-127586-MM
Energy Consulting Services

Qualifications Submittal Deadline: March 2, 2018, 2:00 PM Local Time

Prepared By:
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Business Service Center
1112 Dallas Drive, Suite 4000
Denton, Texas 76205
February 2, 2018
The University of North Texas System (UNTS) subsequently referred to as the Owner, requests firm’s qualifications for Energy Consulting Services for the UNT Health Science Center (HSC) campus in Fort Worth, Texas. UNTS intends to select a firm as a result of the RFQ. In order to assist with project, the firm’s submittal to the RFQ will be the basis of determining the qualifications to perform the professional services.

Sealed qualifications for RFQ763-18-127586-MM will be received by the UNTS at the Business Service Center (BSC), Woodhill Square 1112 Dallas Drive, Suite 4000, Denton, Texas 76205. A campus map can be found online at http://maps.unt.edu/?code=WHS. Parking for Woodhill Square is campus parking and permits are required. There is guest parking at the door to Suite 4000 and only those spaces can be utilized for submitting the bid. Respondents are responsible for all parking costs and for complying with parking regulations. Failure to comply with parking regulations may result in citation and possible impound of vehicle.

The Qualifications will be received up to 2:00 PM local time on Friday March 2, 2018. Responses received after the date and hour above stated will not receive consideration.

Project Description

Energy Consulting Services to provide the UNT Health Science Center campus procurement consulting and data management services for their electricity and natural gas supply.

Questions

Questions concerning this proposal should be directed to:

Monica Madrid, Senior Buyer
monica.madrid@untsystem.edu

All questions must be received no later than 2:00 PM local time on Thursday February 15, 2018. All questions and answers will be posted to the website by 5:00 PM local time on February 19, 2018.

The Owner may in its sole discretion respond in writing to questions concerning this RFQ. Only the Owner’s responses made by formal written Addendum to this Proposal shall be binding and shall be posted on the BSC’s website located at. Oral or other written interpretations or clarifications shall be without legal effect.


Historically Underutilized Business (HUB)

It is the policy of the Owner to promote and encourage contracting and subcontracting opportunities for HUB in all contracts. The firm will be required to provide a HUB Subcontracting Plan (HSP) for the intended subcontracting opportunities for this project.
All subcontracted work whether identified by the Owner or not, is required to be identified in the HSP. The Plan should reflect all subcontracting opportunities to be utilized in this project and can be found online at [http://www.window.state.tx.us/procurement/prog/hub/hub-forms/hub-sbcont-plan--allfms.pdf](http://www.window.state.tx.us/procurement/prog/hub/hub-forms/hub-sbcont-plan--allfms.pdf). Complete, print, sign and submit the HUB Subcontracting Plan form with the bid response. **Failure to complete the HSP correctly will disqualify your RFQ response. Please return the HSP in a clearly marked envelope, separate from your RFQ response.** Only one (1) hard copy of the HSP is required with your response.

The Owner is not bound to accept any of the RFQ responses if they are not in its best interest, as determined by the Owner. The Owner reserves the right to: (a) enter into agreements or other contractual arrangements for all or any portion of the Scope of Work set forth in this Proposal with one or more respondents; (b) reject any and all offers and re-solicit offers; or (c) reject any and all offers and temporarily or permanently abandon this procurement, if deemed to be in the best interest of the Owner.

END OF SECTION
RFQ763-18-127586-MM
SCOPE FOR QUALIFICATIONS

The University of North Texas System, subsequently referred to as UNTS, is accepting qualifications on behalf of the University of North Texas Health Science Center (UNTHSC) and intends to enter into an agreement with a vendor that specializes in Energy Procurement Services in accordance with the terms and conditions and requirements set forth in the Request for Qualifications.

UNTHSC is a graduate-level institution of the University of North Texas System and is one of the nation’s premier graduate academic medical centers, with schools that specialize in patient-centered education, research and health care. The campus covers 33 acres and is located in the cultural district of Fort Worth, Texas.

This Request for Qualifications (RFQ) is to solicit qualifications from Energy Procurement Consultants (hereafter “EPC”) interested in providing procurement consulting and data management services to HSC. The firm’s response to the RFQ will be the basis of determining the competence and qualifications to perform the professional services described herein.

PROJECT DESCRIPTION – ENERGY CONSULTING (Commodity Code: 958-95)

SCOPE

HSC’s facilities are located in a deregulated area for both electricity and natural gas supply. For competitive electricity supply, the estimated annual usage is 25,000,000 kilowatt hours (kWh). For competitive natural gas supply, the estimated annual usage is 57,000 MMBtu’s.

The EPC will provide all guidance and oversight, including data analysis, negotiations with suppliers, pricing reviews, and presentations that may be required to complete and/or approve any agreements or contracts resulting from the RFP response.

BASIC SERVICES – Electricity Procurement

The following is a list of task and activities required to procure HSC’s electricity supply contracts. The EPC will provide all guidance and oversight including data analysis, negotiations with suppliers, pricing reviews, and presentations required to complete and/or approve these contracts. Specific tasks include, but are not limited to:

1. Develop HSC’s electricity procurement strategy
2. Understand HSC’s renewable energy goals
3. Assist HSC staff in writing HSC’s RPF packages for electricity supply. Make recommendations and provide specific language as needed to properly position HSC’s request in the marketplace.
4. Provide data analysis of HSC’s deregulated electricity accounts to be included in the Electricity RFP
5. Assist in developing RFP documents to prospective suppliers.
6. Participate in any pre-bid meeting(s).
7. Respond to clarification questions to be used in addendums as necessary
8. Review all submittals received as a result of RFP.
9. Assist HSC staff in reviewing RFP responses and determining the most advantageous proposal(s) to meet HSC’s needs.

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10. Provide qualitative and quantitative analysis to demonstrate, compare, and contract proposals between each other as well as with supply contracts currently in place.

11. Participate as an advisory role in interviews and negotiations with selected supplier(s) on contract details.


13. Analyze all best-and-final offers and make a firm recommendation to HSC regarding selection of the best supply contracts.

14. Provide facilitation during contract negotiations as requested

15. Draft specific language for accuracy and completeness. Identify any potential pitfalls or omissions in the contract.

16. Be available for Board meetings to explain proposed approaches and contract details on electricity purchases.

17. Prepare and make presentations to HSC’s Board, committees, and/or executives regarding recommendations if necessary.

BASIC SERVICES – Natural Gas Procurement

In addition to the items listed above regarding electricity procurement, the following is a list of tasks and activities required to procure HSC’s natural gas supply contracts. The EPC will provide all guidance and oversight including data analysis, negotiations with suppliers, pricing reviews, and presentations required to complete and/or approve these contracts. Specific tasks include, but are not limited to:

1. Develop HSC’s natural gas procurement strategy.

2. Assist HSC staff in writing HSC’s RFP package for natural gas supply. Make recommendations and provide specific language as needed to properly position HSC’s request in the marketplace.

3. Provide data analysis of HSC’s deregulated natural gas accounts to be included in the Gas RFP.

4. Assist HSC staff in negotiating natural gas delivery via pipeline transportation where necessary to support all natural gas supply required by HSC facilities.

5. Assist in developing RFP documents to prospective suppliers and transporters.

6. Participate in any pre-bid meeting(s).

7. Respond to clarification questions to be used in addendums, as necessary.

8. Review all submittals received as a result of the RFP.

9. Assist HSC staff in understanding RFP responses and determining the most advantageous proposal(s) to meet HSC’s needs.

10. Provide qualitative and quantitative analysis to demonstrate, compare, and contract proposals between each other as well as with supply contracts currently in place.

11. Participate in interviews and negotiations with selected supplier(s) on contract details.

12. Provide consultation during contract negotiations as requested.

13. Draft specific language for accuracy and completeness. Identify any potential pitfalls or omissions in the contract.

14. Be available for Board meetings to explain proposed approaches and contract details on natural gas purchases and delivery options.

15. Prepare and make presentations to HSC’s Board, committees, and/or executives regarding recommendations if necessary.


17. Analyze all best-and-final offers and make a firm recommendation to HSC regarding selection of the best supply contracts.
Monthly Analysis, Data Management, and Consultation

The following is a list of monthly analysis and consulting activities included as part of basic services. This list is not necessarily inclusive of all tasks.

- Track HSC’s electricity use and cost on a monthly basis.
- Track HSC’s natural gas use and cost on a monthly basis.
- Track HSC’s water use and cost on a monthly basis. This includes but is not limited to: regular water, sewer, and irrigation meters.
- Provide monthly reports and analysis comparing HSC’s use and cost to a baseline year and to ongoing marketplace costs, which can be accessed by UNTHSC.
- Maintain any databases, built with past usage provided by UNTHSC, as needed to accomplish data analysis. This database will be updated monthly as usage/cost data becomes available.
- Reports shall be able to identify rationale for cost variances and consider the implications of changes in Transmission and Distribution Service Provider (TDSP) and/or Transportation Pipeline charges. These reports will show market fluctuations and after data analysis.
- Keep HSC staff up to date on market trends and opportunities that may provide savings in HSC’s electricity expenditures.

SPECIAL SERVICES

The EPC may provide special services to HSC in regards to its implementation of a Comprehensive Energy Management Program including, but not limited to, the items listed on an “as needed” basis at the authorization of the Director.

- Forecasting and customized consultation throughout the term of the contract.
- Assistance in analysis of HSC’s ongoing electricity and natural gas programs.
- Billing review and auditing
- Specialized studies targeted and reducing consumption.
- Provide budget projections for all electricity and natural gas usage and cost for both regulated and deregulated locations.
- Manage the provisioning of adding and deleting electricity and/or natural gas accounts to the relative contract.
- Provide assistance to HSC in working with electric transmission and distribution service providers to extend facilities to serve new HSC locations.
- Evaluate merits of power factor correction opportunities.
- Provide access to all HSC utility data through EPC’s online portal. This includes, but is not limited, to monthly use & cost tracking, historical use & cost at least five (5) years back through present, invoice images, budgets/benchmarking, Energy Star tracking, and or other relevant facility information.

MINIMUM REQUIREMENTS
The EPC shall possess expertise in retail energy and natural gas procurement, specifically in the market areas and geographic regions where HSC needs supply contracts. Submissions shall address at a minimum the following areas of qualifications as related to this RFQ.

The EPC shall include documentation on the following:

- Minimum of 5 years of experience in the energy business
- Experience providing Basic Services as defined, including but not limited, to RFP development, contract development & negotiations, financial evaluation & analysis, and ability to provide Special Services as defined.
- Electricity dollars, kWh managed and/or procured annually for clients.
- Natural gas dollars, MMBtu’s managed and/or procured annually for clients.
- Working with both legal staff and prospective vendors to negotiate legal language.
- Presenting complex electricity and natural gas proposal details to executives, committees, and Boards in understandable terms.
- Notable client list

- Proof of Financial Stability by providing the following:
  - Dun and Bradstreet Report no older than one (1) month
  - Audited Financial Statements for the most recent twelve (12) months
- The successful proposer will be required to purchase and maintain, during the term of the contract, insurance as described in Attachment 1 and agrees to the indemnification agreement therein.

Electricity & Natural Gas Market

The EPC shall demonstrate knowledge and experience in the following:

- Electricity and natural gas supply rate structuring.
- Negotiating contracts in deregulated markets, specifically in the market areas where HSC facilities are located.
- Current electricity market trends, pricing & purchasing (specifically, but not limited, to what other hospital customers are paying for electricity).
- Green energy purchasing strategies, using REC’s or other methods of incorporating green energy purchases into our purchasing plans.
- Current natural gas market trends, pricing & purchasing (specifically, but not limited, to what other hospital customers are paying for gas supply)
- Expertise in electricity and natural gas markets
- Expertise in usage and cost analysis
- Expertise in areas listed in Special Services

Past Performance

The EPC proposal shall discuss the following:
• Documented history of staying within budget
• Documented history of meeting deadlines
• Current contracts with HSC
• Potential conflicts of interest
• Prior litigation with HSC

PROJECT APPROACH AND UNDERSTANDING

Each EPC proposal shall at a minimum address the following items in their submission:

• Description of services that have been provided in the past three (3) years that demonstrates EPC’s ability to carry out the proposed services.
• Suggested generic schedule for the procurement of electricity and natural gas.
• Background information, roles, responsibilities, and office location(s) of key personnel that will handle this account including resumes.

SUBMISSION REQUIREMENTS

The responses should address each of the following areas in the same order in which they are set forth below:

1. **Firm Data:**

   • General Qualifications

   • Name and Address(es) of each key sub-consultant firm proposed for the team

   • Firm profile, i.e.:

     i. Age
     ii. Type of firm (partnership, professional corporation, etc.)
     iii. Firm history
     iv. Firm size (professionals by discipline), current and one (1) year ago
     v. Areas of specialty/concentration

2. **Description of the Team:**

   Responses should include all key team members and sub-consultants. Please designate in your response team members and sub-consultants role and duration for this service.

   • Identification of the single point of contact for the team to include name, email address, and phone number

   • Identification of key personnel to be assigned to this service, please include availability and commitment to undertake these services for each key team member.
• Organizational chart illustrating reporting lines, responsibilities, names, and titles for key participants proposed by the firm and each of its key sub-consultants

• Resumes for each key individual on the team and identification of that person’s role. List any education, registrations that may be relevant for this service.

REFERENCES (REQUIRED):

Respondents, please provide three (3) companies who have been using your firm for similar or like services on a regular basis for the past 6-12 months. By listing references, respondent agrees that UNT System may investigate these references and consider them as a basis to determine award.

Provide the following with your qualifications:
• Company Name
• Person to contact with company
• Street address with city, state and zip code
• Telephone number with area code

Historically Underutilized Businesses (HUB)

HUB Subcontracting Plans (HSP) will be required with your response. The HSP must cover all service activities and associated sub-consultants.

The HSP must be sent in the same clearly marked, sealed envelope separate from the RFQ response. The envelope must be labeled “HUB Subcontracting Plan for RFQ763-18-127586-MM”. The envelope for the RFQ response must be labeled “RFQ763-18-127586-MM response”. Both envelopes and electronic media must be mailed or hand delivered in the same package.

Plan for participation of Historically Underutilized Businesses (HUB):

1. It is the policy of the Owner to promote and encourage contracting and subcontracting opportunities for HUB in all contracts. A HUB Subcontracting Plan (HSP) must be submitted with this proposal as specified in “3” below.

2. The Owner has determined subcontracting opportunities are possible and have identified the following areas:

   • Energy Consultants

3. Subcontracted work, whether identified by the Owner or not, is required to be identified in the HSP. Please complete the attached HSP for all subcontracting opportunities to be utilized in the project. Failure to complete the HSP correctly will disqualify the firm’s RFQ response.
Selection Process/Description of Process

The selection process starts after the RFQ is posted on the Electronic State Business Daily on the date listed in Selection Schedule. Following this stage, the selection process is as follows:

1. A pre-submittal meeting will be held at 3:00 PM local time, on the date and time listed in Selection Schedule to answer any questions the potential firms may have before completing their response. The pre-submittal meeting will be held at:

   UNT Health Science Center
   Everett Building, Room #406
   3500 Camp Bowie Blvd.
   Fort Worth, TX 76107

   Parking will be in front of the Everett Building, the parking lot entrance is on Clifton Street. All attendees will need to check in with the attendant at the booth to get directed to designated visitor parking.

2. Qualifications are due on or before 2:00 PM local time on Friday March 2, 2018. Responses must be limited to no more than twenty (20) pages. Covers, table of contents and divider tabs will not count as pages, provided no additional information is included on those pages. All documents should be printed one-sided and submitted in 8 1/2” X 11” page size, portrait style. Proposals received that are late or exceed the number of pages listed above will not be accepted. Provide two (2) copies of the submittal in the form of: one (1) in paper format, loose bound and one (1) electronic format on a virus free CD ROM or flash drive. Both formats must contain the exact same information. Missing information from either format may result in the Owner’s rejection of the response. Overnight carrier or personal delivery to:

   Monica Madrid
   University of North Texas System
   Business Service Center
   Woodhill Square
   1112 Dallas Drive, Suite 4000
   Denton, TX 76205

   Email or faxed responses will not be accepted.

The HSP is due on or before Friday March 2, 2018 at 2:00 PM local time. The HSP must be in a clearly marked envelope, separate from your RFQ response as previously outlined in the HUB section.
3. The Owner may conduct formal interviews.

4. The top-ranked firms will be notified.

5. The Owner expects to reach a contractual agreement with the top-rated firm shortly after notification and will begin immediately thereafter. All documents related to this service shall be and become the property of the Owner.

6. The Owner reserves the right to reject any or all qualifications at any point during this selection process for any reason.

Selection Schedule Summary

The schedule for selection is as follows:

- **RFQ posted on the Electronic State Business Daily**: 02/02/2018
- **Pre Submittal Meeting**: 02/12/2018 at 3:00 PM
- **Questions received no later than**: 02/15/2018 at 2:00 PM
- **Answers to be posted by**: 02/19/2018 at 5:00 PM
- **Qualifications received no later than**: 03/02/2019 at 2:00 PM

The Owner may choose not to conduct interviews. The selected firm will be notified by the Owner that they are top ranked and contract negotiations will begin.

Additional information and amendments may be posted on [http://www.untsystem.edu/bids](http://www.untsystem.edu/bids).

Evaluation Criteria

Firms will be selected on the basis of experience and qualifications using the following criteria

1. Relevant successful experience will be evaluated on the basis of the combined years of experience of key personnel in the energy business. Demonstrated successful experience in the negotiation, financial evaluation & analysis, and ability to provide special services as outlined in the RFQ.

2. Firm performance and quality of past and current services

3. Current capabilities will be evaluated on the basis of experience and capacity (current workload and availability) of individuals assigned to your team.

4. Quality of references provided

5. Financial stability

6. Quality and responsiveness of the RFQ submittal

Questions

Please address your questions concerning this RFQ to:

University of North Texas System
RFQ763-18-127586-MM Energy Consulting Services
Monica Madrid – Senior Buyer  
University of North Texas System Procurement  

Please submit solicitation questions to:  
Monica.madrid@untsystem.edu  

All questions must be received no later than February 15, 2018, at 2:00 PM local time. All questions and answers will be posted to the website by 5:00 PM local time on February 19, 2018.

The Owner may in its sole discretion respond in writing to questions concerning this RFQ. Only Owner’s responses made by formal written Addendum to this RFQ shall be binding and shall be posted on the UNT System website located at http://untsystem.edu/bids. Oral or other written interpretations or clarifications shall be without legal effect.

Do not contact any other individuals from the UNTS. This may result in disqualification.

END OF SECTION