Montgomery County Community College
Purchasing Department
340 DeKalb Pike Blue Bell PA 19422

Request for Proposal for
Energy Procurement and Consulting Services
RFP#17-043014-RFP-01
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1. PROCUREMENT CALENDAR

<table>
<thead>
<tr>
<th>EVENT</th>
<th>DATE</th>
<th>TIME</th>
</tr>
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<tbody>
<tr>
<td>Posting of RFP</td>
<td>4/16/14</td>
<td>5:00PM</td>
</tr>
<tr>
<td>Deadline for Written Questions*</td>
<td>4/22/14</td>
<td>5:00PM</td>
</tr>
<tr>
<td>Posting of Answers to Written Questions (estimated)</td>
<td>4/25/14</td>
<td>5:00PM</td>
</tr>
<tr>
<td>Response Due Date and Time</td>
<td>4/30/14</td>
<td>3:00PM</td>
</tr>
<tr>
<td>Completion of Evaluations (estimated)</td>
<td>5/5/14</td>
<td>5:00PM</td>
</tr>
<tr>
<td>Notification of Award (estimated)</td>
<td>5/6/14</td>
<td>5:00PM</td>
</tr>
<tr>
<td>Contract Start Date (estimated)</td>
<td>5/9/14</td>
<td>N/A</td>
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</tbody>
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*Questions regarding this RFP must be submitted in writing to Montgomery County Community College at the address listed in the contact information section or by electronic mail to cscandon@mc3.edu, by the date and time noted in the procurement calendar. Submission of questions by electronic mail is strongly encouraged. Please include the RFP number on the envelope or in the subject heading. Written questions and responses to the written questions will be posted at WWW.MC3.EDU on the date provided in the procurement calendar. Verbal questions will not be accepted.

All notifications, releases, amendments to this RFP will be posted at the above website.
2. CONTACT INFORMATION

Department:   Facilities Management
Address:   340 DeKalb Pike, Blue Bell, PA  19422

Procurement Leader/Contact: Charles Scandone
Telephone:   215-641-6533
Fax:    215-641-6516
E-mail:    cscandon@mc3.edu

RFP Name:   Utilities Procurement and Consulting Services
RFP Number:              RFP#17-043014-RFP-01

3. PURPOSE OF Request for Proposal

Montgomery County Community College requests responses from qualified Vendors to provide energy procurement and consulting services. The terms and conditions contained in this request for proposals (RFP), in addition to the awarded Vendor’s response proposal, will serve as the contract for this engagement. If a vendor is submitting a proposal based on using a reverse auction, then the vendor must possess the necessary technology and energy consulting skills to perform “Live” on-line reverse and forward auctions for electricity, natural gas, demand response, and renewable energy. In addition, the Vendor must possess the necessary consulting skills to assist Montgomery County Community College with carbon inventory and reduction planning initiatives. The preference is for Vendors who focus solely on energy commodities and climate change consulting and are constantly conducting procurements in the energy market with particular experience working with other government funded clients of similar size and scope. Montgomery County Community College reserves the right to engage the awarded Vendor in procurements for other energy commodities/services, other than those listed above, under a similar fee structure during the term of this contract through a bilateral negotiation.

4. SINGLE OR MULTIPLE VENDORS FOR CONTRACT PERFORMANCE

This contract will be awarded to a single Vendor.

5. SINGLE OR MULTIPLE DEPARTMENTS MAY CONTRACT UNDER THIS RFP

This contract will be available for use by Montgomery County Community College and any other public entities that MCCC may authorize. As addressed in the Scope of Services, the awarded Vendor may be asked to market its procurement services to different agencies, departments, and entities in order to grow the aggregation of energy accounts.
6. CONTRACT TERM

The term of this contract shall be two (2) years with a one (1) year option to renew.

7. FEE STRUCTURE

This will be a 100% usage-based fee structure. Fees will be based on the scope of services provided in this RFP as well as any account usage data that is either provided by Montgomery County Community College or data that is gathered directly by the Vendor. The Vendor will be reimbursed by the winning supplier(s) at a $ per kWh, $ per Dth or other applicable fee rate over the life of the contract for all accounts awarded as a result of services provided. Fees paid by suppliers will be based on the amount of actual energy usage. MCCC will include payment and reporting terms between energy suppliers and the Vendor in the supply solicitation to be issued at a later date.

8. MINIMUM REQUIREMENTS

Failure to meet any of the following minimum requirements may constitute a technically unacceptable offer. Each Vendor must provide evidence of the following:

• The Vendor must be willing to accept all risk in the form of no upfront payment. There will be no upfront costs to Montgomery County Community College and, if in the best interest of MCCC, a supply contract is not executed as a result of the Vendor’s services, MCCC will be under no obligation to compensate the Vendor for services rendered. Provide a statement certifying acknowledgement of these requirements.

• The Vendor must be “supplier neutral” with no ownership ties, partnerships, or other business relationship with any specific energy supplier (i.e. traders, marketers, producers, transporters, generators) that would reasonably be considered a conflict of interest. Provide a statement certifying this fact.

• The Vendor must have conducted an electricity or natural gas auction for at least one Federal, State or Local government client which resulted in energy supply contract awards serving at least 500 accounts. Provide evidence of this procurement.

• The Vendor may have an energy auction platform which can execute real-time, online reverse energy auctions and have conducted multiple auctions in the last three years. Preference is for firms who focus solely on energy auctions, with a primary concentration in electricity and natural gas. Provide a description of the platform, how it allows for real-time bids and evidence that the Vendor has conducted successful energy auctions for at least three years.

• The Vendor may have an energy auction platform used provides an automatic audit trail of time stamped bids and bidder information for each company participating in the auction. Provide verification of this fact.

• The Vendor’s energy auction platform must have up to date security measures and a process of continuous monitoring for malicious code is in place and functioning. Also provide evidence that all session data transmitted between web client and web server
should be encrypted using industry standard Secure Sockets Layer (SSL) technology with a minimum 128 bit encryption.

• The Vendor must have a minimum of 20 registered energy suppliers on its energy auction platform.

• The Vendor must provide three (3) specific examples which demonstrate the Vendor’s experience providing supply-side energy consulting services to Local, State or Federal clients and information on how successful the resulting auction was.

• The Vendor must provide a minimum of five (5) references, three (3) of which are different Local, State or Federal agencies which demonstrate the Vendor’s ability to conduct real-time, online reverse energy auctions on behalf of clients with accounts in multiple utilities and or rate classes.

• The Vendor shall provide information indicating its financial strength and reliability. The Vendor may also provide such other financial assurances as may serve to Montgomery County Community College that, if awarded a contract, the Vendor would be able to meet its obligations. This information should be provided in the form of a narrative.

9. SCOPE OF SERVICES

The selected Vendor will be expected to perform these services under any resulting contract:

Pre-auction Services

• The Vendor will provide market expertise, information, and recommendations throughout the process.

• The Vendor will conduct a survey of active and licensed suppliers as required in the applicable utilities in order to determine the best market strategies, which will generate competitive bids and maximize savings for the participants.

• The Vendor will define data requirements, identify sources of data, and create an electronic central data repository of all relevant account information which is directly accessible to Montgomery County Community College staff. As needed, MCCC staff will assist the Vendor with this task in providing authorizations to collect account numbers and available historical data from the servicing utility and/or current competitive suppliers. The Vendor will be responsible for pulling utility quality data for all accounts included in the procurement directly from the utility and all associated costs.

• The Vendor will provide Montgomery County Community College with Green/Renewable energy procurement options. Assess any requirements from MCCC for the procurement of renewable energy and assist in monitoring the supplier’s renewable performance and certification of any renewable energy credits resulting from energy supply contract awards.

• The Vendor will establish a pre-qualification process for potential energy suppliers. The Vendor will work with Montgomery County Community College staff to develop financial and technical qualifications that suppliers must meet in order to bid. These qualifications
will include, but are not limited to: viability to meet the terms and conditions of contracts, proof of appropriate licenses and transport agreements, adherence to switching rules and enrollment processes, and ability to meet minimum load requirements for competitive supply.

- The Vendor will meet with key points of contacts (POCs) to answer questions, explain the procurement process, and discuss market conditions.

- The Vendor will create an announcement website for each MCCC procurement which will serve as a centralized site for all parties to access data and be notified of updates. In addition to posting questions and answers from bidder’s conferences, the Vendor will also post: rules for the use of the auction platform, historical usage data/demand data in downloadable Excel files, rules, contract terms and conditions, and other relevant data. The Vendor will provide training to Montgomery County Community College staff and qualified energy suppliers/marketers in the use of the auction platform. This procurement specific website will be accessible to both MCCC staff and qualified suppliers.

- The Vendor will provide Montgomery County Community College staff with recommendations for RFP language changes.

- Create a procurement strategy and auction process that requires bidders to provide the lowest bid prices available in the market that conform to Montgomery County Community College’s specific terms and requirements. As part of the procurement strategy, the Vendor will assist the MCCC as requested, to determine the best contract structure for each bidding event within the procurement and provide recommendations regarding pricing products, contract length, bandwidth requirements, and all other variables. The Vendor will provide information regarding the best time to hold the procurement based on timelines specified by MCCC as well as market conditions.

- The Vendor will create an RFP that requires suppliers to provide the lowest bid prices available in the market that conform to Montgomery County Community College specific RFP supply pricing types and service terms sought.

- The Vendor will review the final RFP to ensure that it meets both Montgomery County Community College and supplier requirements including verification of the proper rate class designation for the level of services required by the facility.

- The Vendor will work with Montgomery County Community College staff to advertise the procurement, contact licensed suppliers for the applicable utilities to inform them of the procurement, and register and train them on the energy auction platform. At MCCC’s staff direction, the Vendor will register prospective suppliers as users of the auction platform and answer any questions regarding use of the auction platform.

- The Vendor will provide the technology and facilities to host bidder’s conferences between potential suppliers, Montgomery County Community College staff, and the Vendor. In addition, the Vendor will perform coordination of pre-bid teleconferencing and/or meetings as necessary to ensure registered suppliers understand the procurement process. In addition to facilitating bidder’s conference(s), the Vendor will provide questions and answers from the meeting to the MCCC staff. After Montgomery County Community College’s review, questions and answers will be posted for all potential suppliers to access through the customized website described below.
• The Vendor will create pricing scenarios and forecasts from data provided by Montgomery County Community College staff, other customers, servicing utilities, and market data which may serve as the baseline against which bid prices are compared. To ensure the most accurate calculations, the Vendor will be required to build a price to beat for every account included in the procurement vs. simply analyzing price to beats at the utility rate / tariff level.

**Energy Auction Services**

• The Vendor will work with Montgomery County Community College staff to notify suppliers of the specific auction schedule including RFP numbers and times, conduct the auction, and perform other necessary administrative duties associated with the auction.

• The Vendor will monitor the auction and maintain an audit trail of all supplier communications, bid prices, and bid times. The results will be provided to and be accessible via download by Montgomery County Community College staff in paper format post-auction for contract award. Additionally, the lowest bid price submitted will be clearly identified.

• The Vendor will assist Montgomery County Community College staff in making a determination of which bid is the “best bid” and whether accepting bid prices are in the MCCC’s best interests, if requested.

• The Vendor will assist Montgomery County Community College staff with reaching pricing decisions that adhere to cost savings goals regarding price risk avoidance, maximized savings, renewable energy, and any additional objectives that MCCC deems appropriate.

• The Vendor will perform up to two (2) additional procurements at no cost for the same account set if Montgomery County Community College does not contract in the allotted timeframe following the auction.

**Contract Management Services**

• The Vendor will review the enrollment report provided by the awarded supplier(s) to help facilitate account transition. To make this possible, Montgomery County Community College must include appropriate language in the solicitation requiring the awarded supplier(s) to provide the enrollment report. For accounts not enrolled properly, the Vendor will work with the awarded supplier(s) to resolve any issues.

• The Vendor will work with Montgomery County Community College and the awarded supplier(s) to add and delete accounts as necessary over the life of the energy contract.

• The Vendor will maintain a database of accounts, billing addresses, and contact information over the life of the energy contract.

• The Vendor will provide customer with documentation for due diligence reporting after the successful conclusion of an auction. The documentation will include a copy of the solicitation, the supply contract, the procurement schedule, benchmark analysis, market
reports, award letters, bid prices, and clearly identified submission times and lowest bid prices for each pricing event.

10. INSTRUCTIONS FOR SUBMISSION OF RESPONSES

To be deemed responsive all Vendors must complete and submit the Vendor Response Package.

Vendors responding to this RFP must submit one original (which must be noted as the original and must be signed in blue ink) and two duplicate copies of the response including all required forms and attachments.

Responses must be submitted to:

Marie Ryan, Manager of Procurement and A/P
340 Dekalb Pike
College Hall Rm#121
Blue Bell, PA 19422

A “mandatory” specification is one that must be met in order for a bid to be considered responsive. These are denoted throughout this RFP as “must” or “required”. Any bid that fails to meet a mandatory specification of this RFP may be found non-responsive without further evaluation unless the Montgomery County Community College, in its discretion, determines that the non-compliance is insubstantial, can be corrected, or that an alternative proposed by the Vendor is acceptable.

11. EVALUATION PROCESS AND CRITERIA

Selection of a Vendor to provide energy consulting, procurement, and contract management services will be based on the following criteria. The order of these factors does not generally denote relative importance. Montgomery County Community College reserves the right to consider other relevant factors as it deems appropriate in order to obtain a “best value” provider of energy consulting, procurement, and contract management services. Montgomery County Community College may or may not seek additional information from Vendors prior to making selection.

- Demonstrated experience providing procurement services for different energy commodities. Focusing on:
  - The number of transactions and volume transacted through the Vendor’s auction platform for retail electricity, wholesale electricity, natural gas, RECs, and carbon offsets
  - Experience conducting procurements of similar size, scope, and location to Montgomery County Community College Demonstrated ability and preparedness to perform the required Scope of Services sought under this RFP
  - Demonstrated experience in conducting on-line, real time, energy auctions of similar size and scope
  - Demonstrated experience in preparing carbon inventories and climate action plans, delivering tools to allow for government clients to update inventories on a continuous basis, developing and implementing reduction strategies, outreach programs and offsets
programs and tying local initiatives into both Federal reduction goals and national initiatives.

- Record of performance with other government clients
- Other innovative solutions Vendor may offer
- Attention to submittal requirements
- Qualifications and experience of proposed engagement team

The RFP does not commit Montgomery County Community College to select any firm, award any work, or pay any costs associated with preparing a response to this RFP. Montgomery County Community College reserves the right to accept or reject any or all submittals received and cancel or modify the RFP in part or entirety, when it is in MCCC’s best interest to do so.

After submission and review of responses, interviews may be requested.

**12. VENDOR RESPONSE PACKAGE**

The following are mandatory submittals for this RFP. Failure to provide the requested information may be cause for the bid to be deemed non-responsive and may result in disqualification.

1. **Vendor General Information**

Provide your company name, company address, company phone number, company fax number and Internet address as well as a brief company history. The Vendor must provide a profile of the Vendor’s operations which includes: the number of years the company has been in business; number of full-time employees; and location of the office from which this contract will be managed and all other office locations.

2. **Designated Contract Manager/Project Team**

Vendor must provide a resume’ of the designated contract manager who will be responsible for managing the procurement, reporting results, and ensuring adherence to the scope of services. The resume’ must include name, address, phone number, and e-mail address.

In addition, the Vendor must provide resumes of each individual who will be involved in this engagement.

3. **Minimum Requirements**

Vendor must provide a response to each minimum requirement listed previously.

4. **References**

Vendor must provide references as discussed previously.

Please provide the name and title of the contact, company name, account size, phone number and e-mail address.
Montgomery County Community College reserves the right to verify Vendors’ experience and references. Vendors are responsible for ensuring contacts are aware they are being used as references.

5. Qualitative Technical Qualifications

The Vendor shall provide information indicating the Vendor’s financial strength and reliability. Vendors may also provide such other assurances as may serve to assure Montgomery County Community College that, if awarded a contract, the Vendor would be able to meet its obligations. This information should be provided in the form of a narrative.

6. Bankruptcy/Default/Adverse Conditions

Litigation, Penalties and Bankruptcy: The bidder shall submit:

- A description of any and all investigations, indictments or pending litigation by any federal, state or local jurisdiction relating to the Vendor, any officer, director, partner or member thereof, any affiliate or any related company;
- A list of all criminal convictions within the last five years relating to the Vendor, any officer, director, partner or member thereof, any affiliate or any related entity;
- A list of all civil penalties, judgments, consent decrees and other sanctions within the last five years, as a result of any violation of any law, rule, regulation or ordinance in connection with its business activities relating to the Vendor, any officer, director, partner or member thereof, any affiliate or any related entity;
- A list of all actions occurring within the last five years which have resulted in revocation or suspension of any permit or authority to do business in any jurisdiction relating to the submitting entity, any officer, director, partner or member thereof, any affiliate or any related entity;
- A list of all actions occurring within the last five years that have resulted in the barring from public bidding relating to the Vendor, any officer, director, partner or member thereof, any affiliate or any related entity; and
- A list of all bankruptcy and other similar proceedings within the past five years relating to the Vendor, any officer, director, partner or member thereof, any affiliate or any related entity.

Defaults: The Vendor shall submit:

- A description, in detail, of any situation in which the Vendor’s firm (either alone or as part of a joint venture), or a subsidiary of the Vendor’s firm, defaulted or was deemed to be in noncompliance of any contractual obligations, explaining the situation, its outcome and all other relevant facts associated with the event described. Please also provide the name, title and telephone number of the principal manager of the contract user who asserted the event of default or noncompliance.

Other Adverse Situations: The Vendor shall submit:

- A description of any present facts known to the Vendor that might reasonably be expected to affect adversely either its ability to perform or the viability of any affiliated entity that might reasonably be expected to supply financial support.
- A description of any procurement that it has conducted that resulted in a protest, regardless of whether the protest was successful or unsuccessful.
7. Other Services

The Vendor should describe any other services that may be of interest to Montgomery County Community College.