

The Department of Procurement (the “DOP”)
on behalf of the
Mayor’s Office of Sustainability

FC-8047, Energy Service Performance Initiatives



Presentation Made By: Krista A. Morrison, Esq., Contracting Officer

Monday April 27, 2015
Location: City Council Chambers
Time: 11:00 am

FC-8047, Energy Service Performance Initiatives



- ▶ **Welcome and Introductions**
 - Krista A. Morrison, Esq., Contracting Officer

- ▶ **Ethics Department**
 - Ms. Nina Hickson, Ethics Officer

- ▶ **Enterprise Risk Management**
 - Mr. Jimmy Porter, Risk Management Analyst

- ▶ **Office of Contract Compliance**
 - Mr. Bruce Bell, Senior Contract Compliance Manager

- ▶ **User Department: Mayor's Office of Sustainability**
 - Jalal Slade, Senior Policy Advisor on Real Estate
 - Ruthie Norton, Project Manager

- ▶ **Closing: Department of Procurement**
 - Krista A. Morrison, Esq., Contracting Officer



Be Mindful of...

- **Prohibited Contacts**
- **Non-Authoritative Statements**
- **Plan Holders vs. Attendees at Pre-Proposal Conference**
- **Site Tours**
 - **Monday, April 27, 2015 to Thursday April 30, 2015**
- **Last Date for Addendum Questions:**
 - **Monday, May 4, 2015, 1:00 p.m. (eastern)**
- **Proposal Due Date:**
 - **Wednesday, June 10, 2015, 2:00 p.m. (eastern)**
- **Oral Interview Sessions (*at City's discretion*):**
 - **June 17-18, 2015**



City of Atlanta Ethics Office

Ms. Nina Hickson
Ethics Officer



Office of Enterprise Risk Management

Mr. Jimmy Porter
Risk Management Analyst



Office of Contract Compliance

Mr. Bruce Bell
Senior Contract Compliance Manager

Mayor's Office of Sustainability



▶ Introduction of Department's Business Objectives

- Ms. Ruthie Norton, *Project Manager*

▶ Opening the Floor for Questions & Answers

- **(Statements Made in this Forum Today are Not Authoritative)**

All questions and responses provided are not considered authoritative until placed in writing to the appropriate point of contact within DOP, Krista A. Morrison, Esq., Contracting Officer. She will ensure that a subsequent addendum is issued to all Plan Holders of record.

Contents of Proposals



- ▶ **Proposals should be inclusive of :**

I. Informational Proposal

- ▶ **Volume I - Information drafted by Proponent**

- Executive Summary
- Organizational Structure
- Project Team Members
- Overall Experience
- Management Plan
- Award Preference Form

- ▶ **Volume II - Required Submittal Forms (Forms 1-9)**

- ▶ **Volume III - Preliminary Technical Proposal and Financial Proposal**

Proponents must submit one (1) stamped “original” and twenty (20) copies.

II. Cost Proposal - Exhibit A.1

Proponents must submit one (1) stamped “original” and twenty (20) copies

Next Anticipated Procurement Steps – After Proposal Due Date



- ▶ **Step 1: DOP Will Review Proposal(s) for Responsiveness (within two business days)**
 - Form 1 - Illegal Immigration Reform and Enforcement Act Forms (**IIREA**)
 - Form 2 - Disclosure Form and Questionnaire
 - Form 3 - Proponent Financial Disclosure
 - Form 4.1 - Certification of Insurance Ability
 - Form 4.2 - Certification of Bonding Ability
 - Form 5 - Acknowledgement of Addenda
 - Form 6 - Proponent Contact Directory
 - Form 7 - Reference List
 - Form 8 - Proposal Bond (**not applicable**)
 - Form 9 - Required Submittal Checklist
 - Volume III - Preliminary Technical Proposal and Financial Proposal

- ▶ **Step 2: DOP Will Submit **ONLY** Responsive Proposals to Internal City Stakeholders to Review for Responsibility:**
 - ✓ **Office of Contract Compliance** to Review Appendix A Submittals
 - ✓ **Office of Enterprise Risk Management** to Review Proponents' Financial Disclosure Statements
 - ✓ **Office of Sustainability** to Review for responsibility, and *assessment of a need* for Oral Interviews and Subsequent Scheduling of Collaborative Evaluation Session(s)

Anticipated Award Phase



Phase	Description
Phase I: Active Solicitation Phase	<ul style="list-style-type: none"> Advertisement and selection of Responsive and Responsible Energy Service Provider(s) (“ESP”).
Phase II: Audit Phase	<ul style="list-style-type: none"> <u>Audit Negotiation:</u> City and selected ESP(s) negotiate terms and conditions of facility audits to be complete as well as financing options, from the Preliminary Technical Proposal. <u>Audit Phase:</u> Selected ESP(s) complete ASHRAE Level 3 Audits and provide the City with a list of ECMs with estimated savings.
GESPC Phase	<ul style="list-style-type: none"> <u>Contract Negotiation:</u> At the City’s discretion, City and selected ESP(s) negotiate terms and conditions of the GESPC including project design and financing options. <u>Project Implementation:</u> The selected ESP(s) will work with the most appropriate City Department to execute implement strategies designed in Phase II.
Measurement & Verification	<ul style="list-style-type: none"> <u>Measurement and Verification:</u> The selected ESP(s) will perform ongoing measurement and verification through follow-up monitoring, staff trainings, and any required maintenance to ensure the designed savings are being met.

Reminders

▶ **Addendum Deadline:**

○ **Monday, May 4, 2015, 1:00 p.m. (eastern)**

****QUESTIONS RECEIVED THEREAFTER MAY NOT BE CONSIDERED****

▶ **Proposal Due Date:**

○ **Wednesday, June 10, 2015, 2:00 p.m. (eastern)**

****ABSOLUTELY NO PROPOSALS WILL BE ACCEPTED AFTER 2:00 P.M.****



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