“Simplified” Strategic Master Plan
Request for Proposals
for
(insert organization or collaboration name)

Boston, MA
date

[For discussion]

I. Healthcare System Overview
For each hospital or facility include:
1. Name
2. Number of beds
3. Total square footage
4. Location
5. Extenuating energy circumstances (such as being part of a district power plant)
6. Annual utilities budget

Detailed breakdowns of owned properties, gross square footage will be found in Appendix I

Detailed breakdowns of annual energy use are found in Appendix II

II. Strategic Energy Master Plan Objective
Given the cost saving opportunities, and the organization's concerns regarding public health, patient care, global warming, and the long-term sustainability of resource consumption and its impact on delivery of critical health services, (insert organization) is issuing this request for proposals for development of a Strategic Energy Master Plan (SEMP) covering the listed facilities. To help address these critical issues, the SEMP needs to provide us with information needed to develop a strategic policy for energy conservation, and on-site generation for the next 10 to 15 years.

(insert organization) is considering executing a multi-year partnership with local utilities NSTAR and NGRID to maximize project and technical support incentives and support offered through their Memorandum of Agreement (MOA) and Comprehensive Project Portfolio Initiative (CPPI) respectively. The successful respondent to this RFP will augment and integrate their SEMP work as seamlessly as practical with these utility partnerships.

III. System Goals
(insert organization) is asking prospective Consultants to develop a SEMP which provides strategies for achieving the following goals:

1. Overall 25% or higher reduction in energy consumption by 2018 versus 2008 baseline consumption
2. Upgrade emergency/independent power systems to improve capability of providing reliable power during utility blackouts and disasters.
3. Substantially increased use of renewable/sustainable energy sources.
4. Substantially increase the use of on-site combined heat and power (cogeneration) systems, based on analysis of current year-round coincidental electrical and thermal loads and local site constraints.
5. Develop a 10-year plan outlining annual capital outlays required to meet the SEMP objectives.
6. Maximize incentives from MassSave and/or other providers through partnerships with local utility providers.
IV. Scope of Services

(insert organization) wishes to retain the services of a multidisciplinary consultancy firm, or firms working in partnership, to carry out this comprehensive strategic energy master plan for all of our facilities. The master plan scope of services shall be designed to help (insert organization) achieve the goals stated above.

In addition, the master plan scope of services shall include:

1. Facility energy benchmarking
2. Facility central plant infrastructure assessment
3. Assessment of facility energy conservation opportunities, with special attention to lighting, motors & variable frequency drives, AHU modifications and OA controls, fume hoods, retro-commissioning and water-source heat pumps, occupancy controls, setbacks, and steam system efficiencies.
4. Energy source reliability assessment
5. Assessment of environmental regulations impacting energy technology options
6. Assessment of zoning and related legal issues impacting energy master plan
7. Cost/benefit analysis of renewable technologies
8. Evaluation of water conservation and recycling for potential in reducing energy loads
9. Evaluation of opportunities and constraints in the employment of waste recycling and supplementing energy generation
10. Feasibility of cogeneration system development at each facility
11. Identification of potential city, state, and federal financial incentives
12. Executive summary table with proposed 10 year capital plan for aggregate health system facilities
13. Facility summary table with proposed 10 year capital plan for individual facilities
14. Estimated incentives through MassSave and/or related programs.

V. Deliverables

The strategic energy master plan report shall address (insert organization) goals and scope of services described above. The list of capital investment "projects" will be the prime project deliverable. The final scenario, which encapsulates all of these proposals, must be clear; rational; well thought out; fully costed; prioritized; cost effective and defensible. The business case(s) for each project proposal must be clearly documented. Consultants must therefore propose a prioritization or scoring system that can rank the competing interests of the projects. Some of the criteria could be, but not limited to;

- Deferred maintenance expenditures
- Operating improvements (energy savings etc.)
- Project time frames and funding support
- Risk assessment for each major project
- Potential for revenue generating cost recovery
- Company image
- Incentives through MassSave programs

VI. Consultative Meetings

Extensive consultative meetings are required with (insert organization) and individual facility staff. These fact-finding" brainstorming" sessions will enable the Consultant to assess the current and anticipated situations. (insert organization) will make available a limited amount of time for Consultant access to knowledgeable facility personnel to assist in data gathering for master plan development. In addition the Consultant will have three meetings with (insert organization) management committee to review progress, findings and recommendations.

VII. Qualifications

Consultants must have the requisite experience, resources, qualifications, and capacity to successfully meet the objectives of this multidisciplinary RFP, by providing a quality service to (insert organization). Consultants are therefore requested to provide detailed information that clearly demonstrates the Consultants’ qualifications,
experience and resources available to deliver exceptional results to (insert organization) within the requested timeframe. Consultants must have experience in preparing and executing utility incentives.

VIII. references/past experiences

Consultants are required to provide as part of the proposal the names, dates work, contract value and contract numbers of at least three organizations, including the most recent who can certify the Consultant's ability to perform the similar work. (insert organization) will be contacting these references directly.

The individuals named by the Consultant in the proposal for each of the equities must be the same individuals who carry out the work. In the event the Consultant is awarded the contract then no substitution to personnel will be allowed without the express written permission of (insert organization). If the substitute personnel put forward are unacceptable to (insert organization) and the Consultant is ultimately unable to satisfy this condition, the contract may be canceled. In the event cancellation of the contract, the Consultant will have no claim against (insert organization) for the loss of business.

Ix. Methodology

Consultants are required to provide a detailed methodology that describes key elements of their proposed approach to meeting the objectives, energy savings calculations and deliverables as described in the RFP. Such methodology should provide readers with step-by-step procedures and a schedule of activities to meet these needs, as well as demonstrate a sound understanding of the project requirements.

X. Timetable/Work Plan

Consultants are required to provide as part of their proposal a specific timetable and work plan including proposed timelines for completion of specific tasks, and progress reporting. (insert organization) goal is to have a complete Master Plan for their use in planning capital expenditures within X months of awarding the contract. Proposals should address whether this schedule provides adequate time to complete the specified scope of services, and if not, an alternative timetable, with critical milestone shall be provided.

XI. Fees

Consultants are required to provide total, all-inclusive cost of the work proposed. Consultants shall provide, where applicable, hourly and per diem rates.

The Consultant should include in the proposal:

1. A fee schedule that accounts for each task in your proposed methodology, as well as additional charges or reimbursements
2. Total fee for the engagement
3. Conditions and provisions related to any change to the scope of work

XII. RFP Communication

All communication concerning this RFP must be directed in writing by e-mail to:

name
title
(insert organization)
Street address
city, State
e-mail address:

No person other than the above named person or his or her authorized representative is authorized to speak for (insert organization) with respect to this RFP. Consultants agree not to rely upon nor is (insert organization) bound
by any oral or written as statements are representations of any other persons, whether or not employed by (insert organization).

With respect to any written inquiries regarding this RFP, (insert organization) will endeavor to reply by the dates noted in the schedule. All replies will be via e-mail. If (insert organization) considers the inquiry to be relevant to all Consultants, (insert organization) will provide both the question and the answer to all Consultants by e-mail.

XIII. Electronic Communications

(insert organization) will only receive and reply to enquiries via e-mail. Consultants agree to waive all rights of confidence in their transmission and shall assume all risk of such methods of communication.

XIV. Addenda

(insert organization) hereby reserves the right in its sole discretion to amend this RFP at any time prior to the close of bidding. Consultants are advised that any changes to the RFP shall only be done by formal written addendum transmitted via e-mail by (insert organization)’s authorized representative.

XV. Costs of Bidding

All cost directly or indirectly incurred by the Consultant and responding to this RFP shall be at the sole cost of the Consultant.

XVI. Submission Process

Consultants are required to submit five (5) bound originals of the proposal, in a sealed envelope and one (1) electronic copy in PDF format, each bearing the name and address of the Consultant, and the RFP title clearly marked on the outside of the envelope.

XVII. Information To Be Submitted With A Proposal

- Project Team Experience And Qualifications
- Proposed Staffing, Including Sub-Consultants
- Client References
- Description Of How Your Firm Will Address The Master Plan Development
- Estimated Fee Schedule, With Breakdown By Category

XVIII. Proposal Evaluation Criteria

The following qualifications will be considered, not necessarily in the order listed. Other criteria may also be used. This is not a public bid. (insert organization) reserves the right to select any firm that appears to reasonably offer the desired capabilities, in the sole judgment of (insert organization) staff, although the opinions of others may be sought. And oral presentation may be requested to clarify proposals once the written bids have been evaluated.

1. Relevant experience and references
2. Staff resumes and relevant experience
3. Resources and availability
4. Creativity and breadth of proposed methodology
5. List of any other interests that could be a source of real or apparent conflict of interest. If none, including statement to that effect in your response.

XIX. Proposal Requirements
Qualified firms are invited to submit proposals to the address below no later than (insert date and time). Sponsors must be signed and dated by an official authorized the barn the company and must remain valid for ninety (90) days after the signing date. Respondents must be registered to do business in the commonwealth of Massachusetts. Certificates of insurance will be required prior to contract signing.

Proposals should address each of evaluation criteria above

Address proposals to:
name
title
(insert organization)
Street address
city, State
e-mail address:

XX. General Conditions

It is agreed to hold this RFP, all communications associated with it, and work that may proceed from in confidence, except for information that may be in the public record, obtained in good faith from other parties, required for judicial proceedings, or independently generated. Bidders agree to indemnify (insert organization) against all damages except those due to negligence of (insert organization). Nondiscrimination is required in all aspects of the work. The existence or appearance of any conflict of interest will be cause for disqualification.

XXI. Subcontracting And Assignments

Consultants should note that, unless otherwise agreed, (insert organization) will assume that the employees or agents of the Consultant will be performing all services required by this RFP and any subsequent contract which may be entered into (insert organization). Any subcontracting or assigning in whole or in part by the successful Consultant must be reviewed by (insert organization) in advance.

Therefore, in the event a Consultant wishes to subcontract any portion of the work which is the subject matter of this RFP, the Consultant shall list the name and contact person for the proposed subcontractor together with that portion of the work that the proposed some contractor is to do in their proposal.

In addition, the Consultant shall provide, as part of the proposal, a written statement from an officer of the proposed subcontractor(s) agreeing to be bound to the same terms and conditions as the Consultant is to be bound in this RFP and the final project contract (if any).

In granting consent to any subcontracting or assignment by the Consultant, (insert organization) reserves the right to veto or impose such additional terms as (insert organization) deems advisable as a condition of any subcontractor assignment.

XXII. Joint Proposals

In the event of two or more persons, firms, companies or other organizations which to submit a joint or Consortium proposal pursuant to this RFP, the proposal shall identify a single prime Consultant who will be responsible for overall project management and successful completion of the work to (insert organization)’s satisfaction.

Such prime Consultant shall provide a single point of contact and single billing point who shall for all intents and purposes be treated as the Consultant under the contract. (insert organization) shall not be liable for payment to any of the prime Consultants partners, sub-Consultants, employees, agents or suppliers in the event the prime Consultant defaults on its responsibilities.

XXIII. Contract Termination
In the event that the successful Consultant, in the opinion of (insert organization), fails to satisfactorily perform the services in accordance with the agreement, (insert organization) reserves the right to terminate the contract. In addition to any rights or termination of law or in equity, (insert organization) shall have the right to terminate any contract formed with successful Consultant upon written notice to the consensus will Consultant (insert organization) shall pay all reasonable costs incurred by the successful Consultant up to the date of termination, less any excess costs incurred by (insert organization) in re-procuring and completing the work where termination is for cause. However, in no event shall the successful Consultant be paid for any amount exceeds the price of the agreed fee for the work performed. The successful Consultant will not be reimbursed for any profits which may have been anticipated but which have not been earned up to the date of termination.

Appendix I
Healthcare system utilities summary

<table>
<thead>
<tr>
<th>Facility name</th>
<th>Electricity kWh</th>
<th>Steam Mlbs</th>
<th>Chilled Water Ton-Hrs</th>
<th>Gas MMBTU</th>
<th>Oil #6 MMBTU</th>
<th>Oil #2 MMBTU</th>
<th>Water MCF</th>
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Appendix II
Gross Square footage of (insert organization)-owned properties

<table>
<thead>
<tr>
<th>Building name</th>
<th>Address</th>
<th>Organization Code</th>
<th>City Code</th>
<th>Ext Gross Area</th>
<th>Building Use</th>
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