



# Request for Proposal

Project Delivery Services

Baltimore Gas and Electric (BGE)

2024-2026 Building Tune-up audits

**October, 2023**

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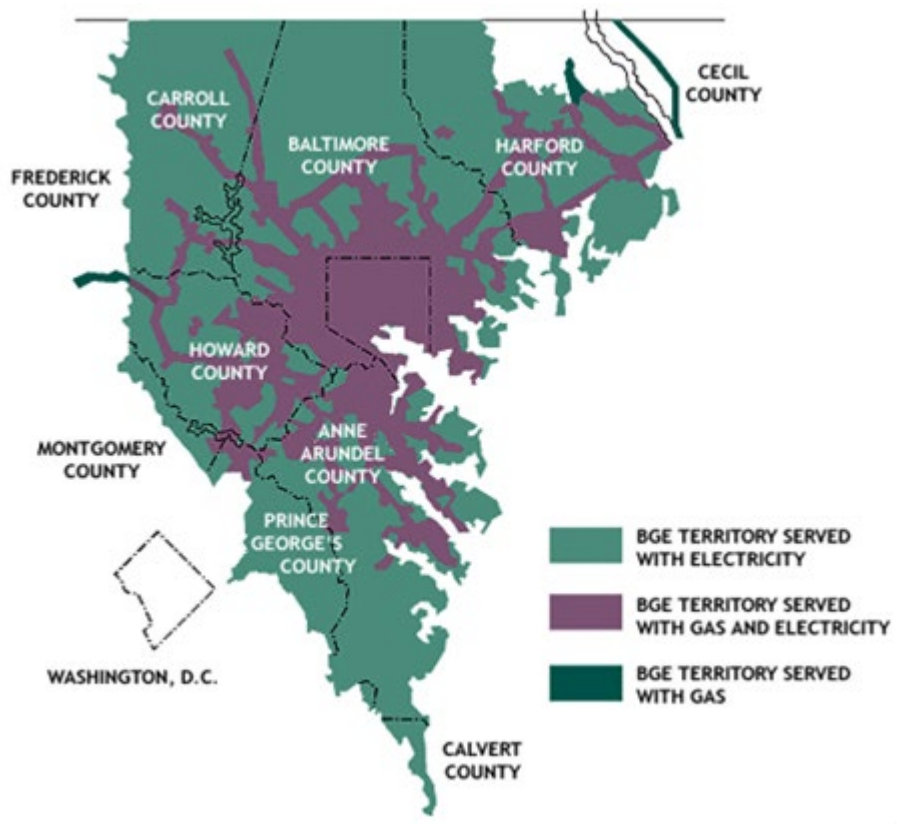
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## 1.0 Introduction

Baltimore Gas and Electric Company (BGE) serves more than 1.2 million business and residential electric customers and more than 630,000 gas customers in a 2,300-square-mile area encompassing Baltimore City and all or part of 10 Central Maryland counties.

### BGE Service Territory



BGE has implemented a suite of energy efficiency programs to provide commercial customers with energy and cost savings opportunities. BGE has selected ICF Resources, LLC, a subsidiary of ICF, to assist in the program design, implementation, and management. ICF has longstanding experience in delivering energy efficiency programs for numerous utilities throughout the United States through its staff and service providers.

BGE is seeking information from qualified engineering firms on their abilities to perform retro-commissioning services for the BGE Smart Energy Savers Building Tune-up Program. The selected engineering firm will be responsible for conducting ASHRAE audits, benchmarking using Portfolio Manager, and providing a turnkey implementation retrocommissioning solution for BGE C&I customers.

BGE and ICF encourage Minority Business Enterprises (MBE's), service-disabled veterans, and women-owned businesses to participate in this opportunity as Diverse Business Enterprises (DBE's). Respondents must provide documentation of such status to be considered a DBE. It is our policy that DBEs shall have the maximum practicable opportunity to participate in the performance of contracts. However, this policy shall not be used to exclude qualified non-DBEs from participating in this opportunity. Selected companies are encouraged to carry out this

policy in the award of subcontracts to the fullest extent consistent with the efficient performance of this contract.

From responses to this RFP, ICF will select a list of engineering firms that will be recommended to customers seeking to have a facility audit done, identify ways to save energy and with customer approval perform retrocommissioning services.

The selected engineering firm (hereafter referred to as “service provider”) will receive training from ICF about the Building Tune-up programs and must follow all program procedures and policies. The service provider is expected to recommend all BGE Smart Energy Savers Programs® for which the customer would be a good candidate.

## **2.0 Minimum Qualification & Eligibility**

ICF is looking for companies with the knowledge and experience to perform a commercial building audit, benchmark, analyze building performance, and identify and implement ways to improve its efficiency. Prospective service providers **must** have experience delivering commercial energy audits benchmarking, and retrocommissioning services and have staff certified to carry out the required tasks. The service provider must have a licensed Professional Engineer (PE) on staff.

In addition to their technical skills, the service provider must be able to clearly present and articulate the benefits of the BGE Smart Energy Savers Building Tune-up Programs to customers and educate customers about energy-saving opportunities in their buildings.

## **3.0 Scope of Work**

The service provider shall provide a direct-install turnkey implementation solution for BGE C&I customers. The service will include the following services for the BGE Building Tune-up Program.

- 1. Conduct an initial customer visit to discuss the program.**
- 2. Conduct an ASHRAE Level II Audit and produce a report.**
- 3. Conduct benchmarking using Portfolio Manager and produce a report.**
- 4. Submit an incentive application on behalf of the customer.**
- 5. Implement the identified energy-saving measures.**

The service provider shall present the report to the customer and BGE for review and approval. The service provider will also be responsible for implementing the identified Building Tune-up retrocommissioning measures. All work done must comply with all local applicable code requirements and generally accepted commissioning practices.

The service provider is also expected to recommend all BGE Smart Energy Savers Programs® for which the customer would be a good candidate. If the customer is interested in learning more about and/or participating in additional BGE Smart Energy Savers Programs, the service provider should refer them to the appropriate BGE/ICF resources for more information.

### **3.1 Building Tune-up Application Process**

The service provider shall submit the application on behalf of the customer or, at a minimum, assist them with the application process. All Building Tune-up applications require pre-approval

before any equipment can be installed, replaced, or modified. BGE will not pay for any projects that were done prior to receiving pre-approval.

These are the basic steps to the application and incentive payout process:

- Application submitted to BGE for pre-approval.
- Audits conducted.
- Benchmarking conducted when applicable.
- Measures installed and commissioned after pre-approval.
- Final project documents submitted to BGE for project close-out and incentive payment.

The following are required for pre-approval:

- A completed application with customer-signed terms and conditions.
- Detailed investigation report as outlined in the ASHRAE I and II templates as applicable.
- Detailed savings analysis, with either Excel or energy model as applicable.
- Placement of local metering devices as applicable
- Detailed photos of all existing conditions that will affect energy savings.
- Pre-trend data where applicable.
- Project cost estimates.

*Pre-inspection may be required before pre-approval is issued.*

The following are required for project closeout:

- Final implementation report as outlined in the ASHRAE Level II template.
- Detailed savings analysis, either Excel or energy model.
- Detailed photos of all post-installation conditions that will affect energy savings.
- Post-install trend data where applicable.
- Signed pre-approval letter.
- A copy of the final project invoice that was submitted to the customer.

*Post-inspection may be required before the incentive is paid.*

## **4.0 Payment to Service Providers**

Each selected service provider will be given a budget to achieve a target energy savings goal in their designated territory. Service providers will bill BGE directly for incentives and collect the remaining customer portion from customers.

Upon project completion, BGE will pay for services and installed measures based on the incentive guidelines. If the customer selects the service provider to receive the incentive, this incentive will be paid to the service provider within 6-8 weeks after the final project review is completed.

## **5.0 Proposal Form**

Companies wishing to participate as service providers should submit a response describing their expertise in providing required services. Each section is required; **incomplete or late responses will not be considered.** Responses should include the following items:

### **Proposal Part 1: Cover Sheet (Attachment A)**

All proposals must include the attached application form as a cover sheet.

### **Proposal Part 2: Questionnaire (Attachment B)**

Please include a response to all questions in the questionnaire. This questionnaire is designed to allow service providers the opportunity to demonstrate their capabilities and specific experience.

### **Proposal Part 3: Energy Audit Report and other documentation**

Please attach to this document an energy audit report and/or any supporting documentation.

### **Proposal Part 4: Provide Qualifications of Key Staff**

A standard resume, including professional experience, publications, membership in professional organizations, education, certifications, training, and any other relevant experience, should be attached.

### **Proposal Part 5: Professional References**

A minimum of three professional references directly related to the delivery of commercial energy audits.

## **6.0 Proposal Evaluation**

The ICF review team is experienced with auditing and the delivery of the Building Tune-up Program. Each proposal will be graded based on the following categories:

- a. Scope of Services: The selected firms must demonstrate a clear understanding of the services being solicited through this RFP. This also takes into consideration the firm's potential MBE/DBE status and appointment availability.
- b. Past Performance: The selected firms shall have strong experience in conducting commercial energy audits.
- c. Complete/Timeliness: The selected firms shall submit a complete and thorough proposal through the Procurement Portal by the deadline provided by ICF.
- d. Customer Service: The selected firms shall have demonstrated success in providing exceptional customer service while delivering commercial energy audits and reporting, including providing results and examples to ICF.
- e. Staffing qualifications: Firms shall display experienced staff, resources, and capacity in providing energy audits and licensing requirements as required.

## **7.0 Deadlines & Submittal Instructions**

Submittals must be delivered by 11:59 PM (Eastern) on Monday, November 16, 2023. Please submit your completed response via the online procurement portal only by the deadline at this URL: <https://eeprocurementportal.com/>. The document must be saved and uploaded in the following format: CompanyName\_Utility\_2023RFP.

## **8.0 For Further Information**

Questions may be submitted on the procurement portal by 11:59 PM (Eastern), Monday, October 30, 2023. ICF cannot guarantee a response to questions received after that date and time. Any questions submitted will be sent to everyone who is registered as a respondent on the procurement portal.

## **9.0 Miscellaneous**

### **9.1 Contract Term**

The contract that results from this RFP will be for services from no earlier than January 1, 2024, and will remain contingent on the sign-date of the agreement through December 31, 2024.

### **9.2 Termination Right of ICF**

ICF may terminate any subcontract agreement at any time upon five days' written notice to the service provider for any reason. ICF shall NOT be responsible for reimbursing the service provider for any cost incurred in reliance on the expectation that the agreement would remain in effect throughout the end of the term.

### **9.3 Termination Right of Contractor**

The contractor may terminate this agreement upon 30 days advance written notice to ICF.

### **9.4 Minority/Diverse Business Enterprises (MBE/DBE)**

ICF encourages minority, service-disabled veterans, and women-owned businesses to participate in this opportunity. Please provide documentation of such status in order to be considered as an MBE/DBE.

## Attachment A: Company Information BGE Building Tune-up Program

### I. Company Details

Company Name: [Click here to enter text.](#)

Street Address: [Click here to enter text.](#)

City: [Click here to enter text.](#)

Zip Code: [Click here to enter text.](#)

Phone: [Click here to enter text.](#)

Email: [Click here to enter text.](#)

Hours of Operation: [Click here to enter text.](#)

Suite #: [Click here to enter text.](#)

State: [Click here to enter text.](#)

Fax: [Click here to enter text.](#)

Website: [Click here to enter text.](#)

### II. Insurance Minimum Requirements

<u>Type</u>	<u>Minimum Amount Required</u>	<u>Have Required Coverage?</u>
Commercial General Liability – Each Occurrence	\$1,000,000	<input type="checkbox"/>
Professional Liability, Errors, and Omissions	\$1,000,000	<input type="checkbox"/>
Business Auto Liability	\$1,000,000	<input type="checkbox"/>
Worker’s Comp – Employer’s Liability	\$1,000,000	<input type="checkbox"/>
Excess or Umbrella Liability – Each Occurrence	\$1,000,000	<input type="checkbox"/>

### III. Counties Serviced

Please check all areas which you are able to service (use additional sheets if necessary):

<u>County</u>	<u>All Zips?</u>	<u>Selected Zips (list next to box)</u>
Harford and Cecil Counties	<input type="checkbox"/>	<input type="checkbox"/> <a href="#">Click here to enter text.</a>
Carroll and Frederick Counties	<input type="checkbox"/>	<input type="checkbox"/> <a href="#">Click here to enter text.</a>
Baltimore County	<input type="checkbox"/>	<input type="checkbox"/> <a href="#">Click here to enter text.</a>
Baltimore City	<input type="checkbox"/>	<input type="checkbox"/> <a href="#">Click here to enter text.</a>
Howard County	<input type="checkbox"/>	<input type="checkbox"/> <a href="#">Click here to enter text.</a>
Prince Georges County	<input type="checkbox"/>	<input type="checkbox"/> <a href="#">Click here to enter text.</a>
Anne Arundel and Calvert Counties	<input type="checkbox"/>	<input type="checkbox"/> <a href="#">Click here to enter text.</a>

### IV. Company History and Performance

Number of Years Performing Audits: [Click here to enter text.](#)

Number of Audits Delivered: [Click here to enter text.](#)





In the table below, list the names of your auditing staff. In the columns to the right list the expiration date (MM/YY) of each BPI certification they have achieved. Please fill out as many sheets as necessary.

Name	Building Analyst?	Envelope?
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N
Click here to enter text.	Y/N	Y/N

## Attachment B: Company Questionnaire BGE Building Tune-up Program

Please provide answers to all questions below. The text box will stretch to accommodate your answers. Sign below upon completing your answers.

1. Are you a registered Maryland business? If so, describe your business. What services does your business currently provide in-house and via service providers? How many customers does your business serve in Maryland?

Click here to enter text.

2. Describe your company’s experience in retro-commissioning (Building Tune-up), energy efficiency, energy audits, and providing comprehensive building performance services. Please provide any examples (building, project, etc.)

Click here to enter text.

3. How many building ASHRAE Level 2 energy audits have you completed in the last year?

Click here to enter text.

4. Are you familiar with ENERGY STAR Portfolio Manager?

Click here to enter text.



5. Do you typically do benchmarking with Portfolio Manager as part of your energy audit service?

[Click here to enter text.](#)

6. What is your pricing structure for energy audits?  
a. ASHRAE Level 1 Audits  
b. ASHRAE Level II Audits  
c. Benchmarking with Portfolio Manager

[Click here to enter text.](#)

7. Describe your company's approach to customer service through specific examples. Documented internal company workflows for dealing with challenging customers are preferred, and awards/articles/testimonials proving positive customer service are also welcome to demonstrate your company's commitment to providing exceptional customer service.

[Click here to enter text.](#)

8. Please highlight your company's ability to handle a large increase in volume.

[Click here to enter text.](#)

9. What volume of customers do you typically service per month/ year?

[Click here to enter text.](#)

10. Are you currently a participant in any of the other BGE Smart Energy Savers Programs?

[Click here to enter text.](#)

11. Is your company certified in Maryland as a Woman, Minority, or Disadvantaged Business Enterprise (MBE/DBE)? If so, please respond below and attach documentation of MBE/DBE status.

[Click here to enter text.](#)

I understand this application is to determine my eligibility to participate in the BGE Building Tune-up Audit Program and does not constitute any formal participation in Building Tune-up. I further understand that if my company is selected to participate, it will require signing a standard task ordering agreement with ICF on behalf of BGE outlining all terms, program policies, and procedures to deliver Building Tune-up services.

Please check if you have read and understand the impact of the KPI requirements (Appendix 2):

**Company Representative Name:** [Click here to enter text.](#)      **Title:** [Click here to enter text.](#)

**Signed:**



## **ASHRAE Level II requirements**

### **Appendix 2**

- **The ASHRAE Level II Audit should include, but not limited to:**
  - Building envelope assessment.
  - Detailed HVAC system analysis.
  - Lighting system assessment.
  - Control system evaluation.
  - Energy consumption analysis.
  - Indoor air quality assessment.
  - Benchmarking the building using Portfolio Manager.
  
- **The ASHRAE Level II Energy Audit report shall include the following information:**
  - Title Page and Table of Contents
  - Executive Summary of the findings
  - Introduction section, including names and contact information for the Building Owner, Building Manager, and BT Service Provider
  - Detailed building and energy systems description, including more accurate estimates of the equipment usage profiles.
  - Detailed operations and maintenance review – This will include current standard operating procedures (SOP).
  - Detailed equipment lists for mechanical and electrical systems.
  - Documentation of O&M refresher training for facility O&M staff
  - Detailed operational scheduling of the major systems
  - Documented evidence of any energy use reductions resulting from immediate changes implemented.
  - A list of EEMs identified showing:
    - Description
    - Projected Costs
    - Projected Savings
    - Simple Payback with and without incentive
    - Total of Low-Cost/No-Cost Items
    - Total of Major Capital Items
  - Assessment of the existing equipment oversizing and recommendations for rightsizing when HVAC equipment needs replacement.
  - Scope of work and budget for the entire project

## **Key Performance Indicator Requirements – Appendix 3**

### **Data Security**

ICF is responsible for no material breach of Exelon's data security requirements as outlined in [specific document and provision in contract with Exelon] that is the direct result of gross negligence or willful misconduct by the service provider. "Material breach" in this clause shall mean unauthorized release of confidential data concerning 1,000 or more customers.

- *The penalty for non-compliance of this goal is 1% of the contract amount annually.*

### **Safety (OSHA Recordable and RVAs)**

Per BGE's safety philosophy for a zero tolerance approach, the service provider will have no Recorded Vehicle Accidents (RVA) or OSHA recordable incidents for which the service provider or service providers thereof adjudicated to be at fault by a court (for an RVA) or by a governmental agency of competent jurisdiction (for an OSHA recordable incident). Any RVA or OSHA recordable incident that pre-dates the effective date of this Agreement shall not be considered.

- Recorded Vehicle Accidents are those events for which a police report is filed and an service provider or service providers thereof employee is charged and convicted of a traffic violation while in the direct course of fulfilling contract responsibilities, and for which bodily injury to a third party requiring professional medical attention or property damage to a third party in excess of \$2,500 occurs.

"OSHA recordable incidents" as used in the document is to be construed consistent with the requirements outlined 29 CFR 1904.4, et seq., and means fatalities, injuries, and illnesses that: (1) are work-related, as defined in 29 CFR 1904.5; and (2) are a new case, as defined in 29 CFR 1904.6; and (3) meets one or more of the general recording criteria of 29 CFR 1904.7 or the application to specific cases of 29 CFR 1904.8 through 29 CFR 1904.12.

- *One violation in a year will result in a 1% penalty. Each subsequent violation in a year will result in a penalty fee of \$2,500 per incident.*