

CITY OF BRISBANE
REQUEST FOR PROPOSALS

BENCHMARKING AND TRANSPARENCY ORDINANCE
GENERAL INFORMATION AND REQUIREMENTS

1. PROJECT BACKGROUND

The City of Brisbane committed to addressing the carbon footprint of our buildings through our 2015 Climate Action Plan (CAP). In the years since, staff and the city's Open Space and Ecology Committee (OSEC), a citizen advisory committee to the city council, have explored various policy and programmatic options, culminating in a discussion with City Council Liaisons at OSEC's April 2018 meeting. Due to the significance of the commercial sector in Brisbane's overall emissions profile and the perceived challenges of residential mandates, an ordinance focused on reducing energy use in commercial buildings through benchmarking, auditing and retro-commissioning requirements was prioritized.

Through research of numerous building energy ordinances around the country, city staff and CAP Subcommittee volunteers have identified the City of Los Angeles Existing Buildings Energy and Water Efficiency Ordinance as a model. As with many others, including the State's AB802, the ordinance uses the Energy Star Portfolio Manager tool for the initial step of benchmarking buildings. The city also intends to use this readily-available tool, ensuring consistency between state and local requirements and familiarity for building owners with compliance requirements in other jurisdictions.

In May 2018, the City applied for and was subsequently awarded a grant from the Bay Area Air Quality Management District's Climate Protection Grant Program for a Comprehensive Commercial Building Efficiency Program. The two-phase two-year project envisions ordinance development and program implementation phases each requiring roughly one year; separate RFPs will be issued for each phase with this RFP representing Phase 1. The Air District funds provide the support for this professional consulting services contract, which will be managed and supplemented by staff resources provided by the City.

2. SCOPE OF SERVICES

The City of Brisbane seeks qualified consultants to work with city staff, the citizen advisory committee and other local stakeholders to: draft an ordinance; perform community outreach, particularly through the Brisbane Chamber of Commerce / to the local business community; facilitate public workshops; and shepherd the ordinance through Council approval. While the particular details of the ordinance will necessarily be determined through this development phase, staff envisions: extending benchmarking requirements to all commercial facilities, including most multi-family dwellings, and tiered auditing and retro-commissioning requirements that exclude the smallest buildings and high-performing facilities. Benchmarking, auditing and retro-commissioning would apply to both energy and water.

The selected consultant will assist the City in delivering the following Scope of Work per the grant agreement with the Air District:

Task 1.1: Issue RFP/Contract for Ordinance Consultant

The City of Brisbane will develop and distribute a request for proposals from qualified consultants who will be responsible for preparing a draft commercial and multi-family building ordinance for buildings under 50,000 square feet, to be adopted by the City Council. The ordinance will include requirements for benchmarking energy and water use annually, and for periodic energy and water auditing and/or retro-commissioning. The consultant also will provide assistance conducting public and staff meetings, reaching out to the City's Citizen Advisory Committee and other local stakeholders, and providing technical assistance at City Council and Planning Commission meetings.

Deliverables

1. Request for Proposals
2. Consultant contract

Task 1.2: Convene Kick-off Meeting

Convene a project kick-off with city staff, consultants, the Open Space and Ecology Committee's Climate Action Plan sub-committee members, and Council representation to discuss project goals and schedule.

Deliverable

1. Kick-off meeting agenda, summary of outcomes and list of participants

Task 1.3: Convene Community Workshops

City staff and consultants will work with the Chamber of Commerce to facilitate two public events, one workshop held during regular business hours and one evening mixer. Events and opportunities for the public to submit feedback (i.e. by email, website contact form and/or letters) will be promoted through City and Chamber newsletters, emails and social media accounts.

Deliverable

1. For each workshop, provide the agenda, presentations and other materials, participant list and short list of key outcomes

Task 1.4: Develop Draft Ordinance

Consultants will develop a draft ordinance for commercial and multi-family residential buildings that will require certain activities that may lead to reductions in energy and water use, and greenhouse gas emissions. Required activities may include: extending benchmarking requirements to all commercial facilities, including most multi-family dwellings, and tiered auditing and retro-commissioning requirements that exclude the smallest buildings and high-performing facilities. Benchmarking, auditing and retro-commissioning would apply to both energy and water. Ordinance will include a mechanism for demonstrating and reporting on compliance.

Deliverable

1. Draft ordinance

Task 1.5: Prepare and Present Draft Ordinance to Council for Adoption

Commence a public comment period with a “2x2” study session, with two council members and two Open Space and Ecology Committee members. Present the draft ordinance to the full Open Space and Ecology Committee and ultimately to the full Council for adoption.

Deliverables

1. Council presentation(s)
2. Council document confirming adoption of ordinance

Progress Reports

The City is responsible for submitting quarterly progress reports describing progress toward completion of the work outlined above every January 15, April 15, July 15, and October 15 until the end of the grant term. Quarterly progress reports shall be prepared on the Air District’s Quarterly Report form (provided separately). The consultant will report their progress to city staff no fewer than five (5) working days prior to the City’s quarterly report due dates.

3. QUALIFICATIONS

Firms must demonstrate adequate knowledge and experience on similar types of projects over the past five (5) years. Of particular importance is the firm’s ability to meet the defined project scope within the time frame and budget of the City’s grant agreement with the Air District.

4. INSURANCE REQUIREMENTS

Per the Agreement for Professional Services

5. INFORMATION PROVIDED BY THE CITY

- Exhibit A: City of Brisbane BAAQMD Climate Protection Grant Application
- Exhibit B: Sample Agreement for Professional Services

6. PROPOSAL FORMAT

The proposal will include as a minimum the following information:

A. Cover/Transmittal Letter

Introduce the consulting firm and summarize its qualifications, including any relevant professional licenses or certifications, indicate that that Project Manager has reviewed the sample Agreement for Professional Services and either agrees to the proposed scope of services, terms, and conditions of the Agreement or has included proposed amendments in the proposal. (If proposed amendments are not stated, the City will assume that the terms in the agreement are acceptable.) Also, provide the name, address, phone, and email address for the designated contact person for all correspondence through selection of Consultant.

B. Project Understanding and Approach

Provide a detailed description of the consultant's overall understanding of the proposed project. Describe the proposed approach for successfully completing the project, including engaging the multiple project stakeholders and facilitating the ordinance approval. Based on your experience, discuss any challenges that may be encountered, and areas of concern that may need to be addressed. Provide a detailed scope of services that outlines the required steps to accomplish the project.

C. Project Team

Include a table of organization for the project showing the Project Manager and Key Project Staff. Project Manager shall not be replaced without written permission of the City. If two firms are submitting a proposal, one firm shall be designated as the lead firm with one lead project team representative designated from that firm for the duration of the project. Provide a brief narrative description of the qualifications and experience of each key person, along with their proposed project responsibilities.

Indicate if the firm or any primary members of the team have been involved in any arbitration or litigation in the past five years related to their consulting on public ordinances or if any building energy-related ordinances the firm or primary team members have worked on have been challenged.

D. Relevant Experience

Include descriptions of similar projects completed within the past five (5) years that are comparable to the proposed improvements. Indicate past experience working with each team member, including any associated firms and major subconsultants. Give examples of projects similar to this project completed by the team as a team or partial team. Explain the contractual relationship between team members (i.e. in-house, joint venture, subcontract).

E. Project Time Line and Budget

Describe how the team will meet the project objectives within the schedule. Prepare a schedule for major milestones for all deliverables. Describe how your team will effectively manage project budget creep and cost escalation.

Provide a basic estimate of the total number of labor hours expected to be required to perform each task completed for the project. Include a breakdown of the employees and professionals to be assigned to the tasks.

Present an estimated fee for consulting services per task as described in the Scope of Services. Breakdown the cost estimate into labor, fees, and expenses. Fees will include all markups, overhead, and profit.

F. Appendix

May include resumes of team members, samples of previous work products, or other pertinent information. No company brochures will be allowed.

Items A-E shall not exceed 10 pages in length.

7. PROPOSAL SUBMISSION DEADLINE

The proposal must be submitted by 4:00 p.m. November 29, 2018. Submissions will be confirmed by email within an hour.

8. SUBMIT PROPOSALS AND QUESTIONS

By email to Adrienne Etherton, Sustainability Management Analyst, at aetherton@brisbaneca.org, subject line: BATO RFP.

9. SELECTION PROCESS

Written proposals submitted by the deadline will be evaluated, and interviews may be conducted select firms.

Proposals will be evaluated based on:

1. Project understanding and approach.
2. Consulting firm’s past experience and performance.
3. Proposed team’s demonstrated success in working together on projects of similar complexity.
4. A demonstrated ability to manage consulting services so that the project stays within the target budget, and so that the design is completed within the project schedule.

After final selection, the highest rated firm will be invited to negotiate the final scope of work and fee. A key aspect of this negotiation will be the Consultant’s development of a deliverable-based payment schedule.

Should the City fail to successfully negotiate a contract with the highest rated firm, the City reserves the right to terminate negotiations, and to open negotiations with the next most qualified firms until a contract is successfully negotiated.

10. PROJECT SCHEDULE - The anticipated project schedule is as follows:

A. RFP Posted and Sent to Consultants	10/19/18
B. RFP Question Deadline	11/9/18
C. RFP Question Responses Posted and Sent to Consultants	11/16/18
D. Proposals Due	11/29/18
E. Final Rating of Consultants	12/7/18
F. Negotiate Final Scope and Fee	12/20/18
G. Approve Contract at City Council Meeting	January 2019
H. Kickoff Meeting with Project Team	February 2019
I. Community/Chamber Workshops	March-May 2019
J. Draft Ordinance	June 2019
K. Study Session	July 2019
L. Public Comment Period and Revisions	July-August 2019
M. Ordinance Adopted	September 2019