

REQUEST FOR PROPOSAL

No. 02-19

Regional Energy Network (REN) Development

January 31, 2019



Western Riverside Council of Governments
3390 University Avenue; Suite 450
Riverside, CA 92501
(951) 406-6700
www.wrcog.us

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1. INTRODUCTION

The Western Riverside Council of Governments (WRCOG) is releasing this Request for Proposal (RFP) No. 02-19 to solicit firms interested in assisting the Coachella Valley Association of Governments (CVAG), San Bernardino Council of Governments (SBCOG), and the Western Riverside Council of Governments (WRCOG) with the development of a Business Plan and Implementation Plan for development of a Regional Energy Network (REN) that will be submitted to the California Public Utilities Commission (CPUC) for approval. All three Councils of Governments (COGs) will be working together to establish a REN which will include the participating member agencies within each respective COG's boundaries.

This project will consist of two separate phases. Phase 1 will include the selected Contractor assisting all three COGs with drafting, review, and submitting a Business Plan to the California Public Utilities Commission (CPUC), Market Analysis study / identification of market barriers, California Energy Efficiency Coordinating Committee (CAEECC) stakeholder engagement / addressing feedback in regards to the Business Plan review process, and CPUC Energy Division review / response to request per the Business Plan review process. Phase 2 will include the selected Contractor assisting all three COGs with drafting, review, and submittal of an Implementation Plan to the CPUC, assisting with the development of an Annual Budget Advice Letter (ABAL), assistance with the development of a Joint Cooperation Memo (JCM) that will involve coordination between the Investor Owned Utilities (IOUs), and drafting / review of energy efficiency metrics filing(s).

The proposal is for a 2-year professional services contract. Proposals may be submitted by a single firm or jointly by multiple firms/ organizations.

In 2012, the CPUC authorized a new model for administering energy efficiency programs outside the traditional IOU-administered paradigm. These new models are known as Regional Energy Networks (RENs).

The CPUC sought for the RENs to address the following three operational areas:

1. Undertake programs that the Investor Owned Utilities (IOUs) cannot or do not intend to do.
2. Target hard to reach areas.
3. Design programs that have the potential to be scaled to larger geographic areas.

In addition to these directions provided by the CPUC, RENs were also directed to address Workforce Education & Training (WE&T); Technology development; and programs within the field of Water / Energy Nexus. The goal of a REN is to implement and administer energy efficiency programs the current IOUs cannot or do not have the available resources to implement within each service territory. In addition to this goal, RENs look to fill the gap that IOUs cannot reach. For RENs, the term "filling the gap" means areas that are hard to reach or low-income communities. Filling the gap in these areas that are considered to be hard to reach or low-income includes communities that are areas that do not have easy access to program information or participation in energy efficiency programs due to language, geographic location, economically demographic and housing type (rent / lease, multi-family & mobile home tenants).

In December 2018, WRCOG staff received direction from the WRCOG Executive Committee to develop and administer a Regional Energy Network (REN) that would look to fill the gaps of the current offerings that are provided by both IOUs, Southern California Edison (SCE) & Southern California Gas Company (SoCal Gas). In addition to filling the gaps, the REN will look to evolve the current Local Government Partnerships (LGPs) that are offered within both San Bernardino and Riverside Counties. All three COGs currently have active LGPs that provide energy efficiency support to its members and are looking to expand the opportunities that can be offered in the means

of energy efficiency through the implementation of a REN. All three COGs are interested in working together to create a REN within the Inland Empire because it allows for the idea of local control & regional perspective. With the opportunity to create and administer energy programs in both Counties, RENs allow the agencies to provide programs to its members that catch their interest and provide ongoing support within the field of energy efficiency. In order for a REN to be established in both San Bernardino & Riverside County, all three COGs are seeking support from qualified firm(s) that would assist with development and submittal of both a Business Plan & Implementation Plan to the CPUC. It is anticipated the WRCOG would be the fiscal agent for REN development.

WRCOG is a joint powers authority whose purpose is to unify Western Riverside County so that it can speak with a collective voice on important issues that affect its members. Representatives from eighteen (18) cities in Western Riverside County, the County of Riverside, Morongo Band of Mission Indians and the Eastern and Western Municipal Water Districts have seats on the WRCOG Executive Committee, the policy setting Board for the Agency. The Riverside County Superintendent of Schools is an ex-officio member of the Executive Committee. As a joint powers authority, WRCOG examines a range of regional matters critical to Western Riverside County’s future.

Similarly, SBCOG is a joint powers authority representing its member agencies on regional issues in San Bernardino County. SBCOG member agencies include 23 cities and San Bernardino County. CVAG is also a joint powers authority in the Coachella Valley and eastern Riverside County which works on regional issues with ten cities, Riverside County, the Agua Caliente Band of Cahuilla Indians and the Cabazon Band of Mission Indians.

For more information about WRCOG please visit the website at www.wrcog.us.
 For more information about SBCOG please visit the website at <http://gosbcta.com>
 For more information about CVAG please visit the website at www.cvag.org

2. SUBMISSIONS

All bid proposals must be submitted electronically. Proposals must be received by the deadline listed in this RFP and submitted to:

Name	Western Riverside Council of Governments
Address	3390 University Avenue, Suite 450; Riverside, CA 92501
Attn:	Casey Dailey, Director of Environmental & Energy Programs
Email	cdailey@wrcog.us

Proposals shall include a Table of Contents listing all items included in the proposal. See Section 15 for proposal information, organization, and content guidance. It shall be the responsibility of the Proposer to submit the proposal and all other required items specified in this RFP by or before **5:00 p.m.** Pacific Standard Time (PST) on **Thursday, March 7, 2019**. WRCOG will not accept any proposal received after the proposal submission time and date.

3. QUESTIONS AND ANSWERS REGARDING THIS RFP

Questions can be directed to the attention of:

Name	Casey Dailey, Director of Energy & Environmental Programs
Address	3390 University Avenue, Suite 450; Riverside, CA 92501
Phone	(951) 405-6720
FAX	(951) 390-7499
Email	cdailey@wrcog.us

4. BUDGET PARAMETERS

Proposed budgets must provide complete cost itemizations by project, task, and deliverable.

Budget: Not to exceed \$150,000 (for both Phase 1 & 2)

5. DUE DATES

All proposals are due by **5:00 p.m. PST on Thursday, March 7, 2019**. Any proposal received after the required time and date specified for receipt shall be considered late, and will not be evaluated for award.

6. SCHEDULE OF EVENTS

Event	Date
1. RFP Distribution	January 31, 2019
2. Questions from Vendors about scope or approach due	February 14, 2019
3. Responses to questions posted on website	February 26, 2019
4. Proposal Due Date	March 7, 2019
5. Review of proposals	Week of March 11, 2019
6. Potential Interviews	Week of March 18, 2019
7. Anticipated decision and selection of Vendor(s)	Week of March 25, 2019
8. Anticipated commencement date of work	Upon approval of contract by Executive Committee

7. WRCOG RIGHTS

Award of the contract resulting from this RFP will be based upon the most responsive proposal whose offer will be the most advantageous to WRCOG, CVAG, and SBCOG in terms of cost, functionality,

effectiveness in meeting goals and objectives, and other factors as specified elsewhere in this RFP.

A. WRCOG reserves the right to:

1. Disqualify any and all proposals that are not submitted in accordance with the required format described in this RFP
2. Reject any and all proposals submitted
3. Request additional information
4. Issue Addenda to this RFP
5. Award all or part of the work contemplated in this RFP
6. Remedy errors in the RFP
7. Cancel the entire RFP
8. Issue a subsequent RFP
9. Approve or reject the use of a particular subcontractor/supplier
10. Negotiate with any, all, or none of the Proposers. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer
11. Accept other than the lowest priced proposal
12. Award a contract without interviews, discussions, or negotiations
13. Award a contract to one or more Proposer

B. All Proposers should be aware of the insurance requirements for Contract Award. The Certificate of Insurance must be provided by the successful Proposer prior to Contract Award. A contract may not be awarded if insurance requirements are not met.

C. WRCOG does not reimburse for the cost of proposal preparation, even in the event of RFP cancellation.

D. Communication between the Proposer and any member of the proposal Review Committee during the selection process is prohibited, except when and in a manner expressly authorized in this RFP. Violation of this restriction is grounds for disqualification of the communicating Proposer's proposal.

E. Every proposal submitted is considered a firm offer that must be valid for a minimum of ninety (90) calendar days.

F. If applicable, WRCOG prefers that software developed under WRCOG's contract not incorporate proprietary and/or third party software components. This does not preclude the development of deliverables which interface with commonly-available off-the-shelf software. However, contractors must determine in advance whether WRCOG already has, or is willing to procure appropriate licenses for any proprietary and/or third party software that would be required. Proposer must also provide the impacts of any enhancements and upgrades. WRCOG will require delivery of documentation and source code for all electronic intellectual property developed under a WRCOG contract prior to releasing final payment to the contractor.

8. ADDENDA

WRCOG reserves the right to revise the RFP documents. Any WRCOG changes to the requirements will be made by written addenda to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any contract resulting from this RFP. Addenda will be posted on the WRCOG website. It is the responsibility of the Proposers to check the WRCOG

website to determine if any addenda have been issued. WRCOG will not be bound to any modifications to or deviations from the requirements set forth in this RFP as the result of oral instructions. Proposer shall acknowledge receipt of addenda in their proposal. Failure to acknowledge receipt of all addenda may cause the proposal to be deemed non-responsive to this RFP and be rejected without further evaluation.

9. NOTIFICATION OF RIGHT TO PROTEST CONTRACT AWARD

Proposer has the right to protest the contract award. A written protest must be filed with WRCOG's Deputy Executive Director, Operations within five (5) working days after posting of award decision. WRCOG will not accept any verbal protests. The protest must be a detailed, written statement of the protest grounds and reference the RFP number and name of the designated Contracts Administrator. Grounds for a protest are that WRCOG failed to follow the selection procedures and adhere to requirements specified in this RFP or any addenda or amendments; there has been a violation of conflict of interest as provided by California Government Code section 87100 et seq.; or violation of State or Federal law. WRCOG will only consider those specific issues addressed in the written protest. The protest must be submitted to via 1) certified mail and 2) either fax or e-mail using the contact information provided below.

Name	Barbara Spoonhour, Deputy Executive Director, Operations
Address	3390 University Avenue, Suite 450; Riverside, CA 92501
Phone	(951) 405 - 6760
FAX	(951) 390-7499
Email	bspoonhour@wrcog.us

A written response from WRCOG will be directed to the protesting Proposer within fourteen (14) calendar days of receipt of the protest, advising of the decision with regard to the protest and the basis of the decision.

10. CONFLICTS OF INTEREST

All Proposers responding to this RFP must avoid organizational conflicts of interest which would restrict full and open competition in this procurement. An organizational conflict of interest means that due to other activities, relationships, or contracts, a Proposer is unable, or potentially unable, to render impartial assistance or advice to WRCOG, CVAG, or SBCOG; a Proposer's objectivity in performing the work identified in the Scope of Work is or might be otherwise impaired; or a Proposer has an unfair competitive advantage.

11. CONTACTS

Any questions concerning technical specifications or Scope of Work requirements must be submitted in writing by Thursday, February 14, 2019 and directed to:

Name	Casey Dailey, Director of Energy & Environmental Programs
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Address	3390 University Avenue, Suite 450; Riverside, CA 92501
Phone	(951) 405-6720
FAX	(951) 390-7499
Email	cdailey@wrcog.us

Answers to questions will, at minimum, be posted on WRCOG’s website at www.wrcog.us no later than Tuesday, February 26, 2019.

12. TERMS AND CONDITIONS

Any Proposer submitting shall state their willingness to agree to the following terms and conditions:

- A. The awardee must be fully committed to the mission of WRCOG, CVAG and SBCOG.
- B. Termination - A termination agreement is to be negotiated between the parties that includes provisions on termination for cause and termination for convenience.
- C. Oral Presentations - Any Proposer who submits a proposal in response to this RFP must be willing to make oral presentations related to contract-related activities at the request of the WRCOG, CVAG, or SBCOG Executive Committee or Management.
- D. Compensation - The total value of this contract is undetermined. The schedule of compensation will be mutually negotiated. The compensation plan will include payment based upon an assessment of the Proposer’s attainment of specific, measurable outcomes or “performance benchmarks,” which will be mutually developed between WRCOG and the selected Proposer.

13. WRCOG STANDARD PROFESSIONAL SERVICES AGREEMENT

The successful Proposer will be required to sign WRCOG’s Standard Professional Services Agreement in order to receive the contract award. Proposer must identify in their proposal any concerns or objections they would have with any of the agreement’s terms and conditions if selected for contract award. Proposer shall propose alternative language for consideration in their proposal. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer. The agreement may be viewed on WRCOG’s website at <http://www.wrcog.cog.ca.us/DocumentCenter/View/334/WRCOG-Professional-Services-Agreement-PDF?bidId=>

14. EVALUATION CRITERIA

Any award to be made pursuant to this RFP will be based upon the proposal with appropriate consideration given to operational, technical, cost, and management requirements, and following the Scoring Criteria (Attachment A). Evaluation of offers will be based upon each Proposer’s responsiveness to the RFP and the total price quoted for all items covered by the RFP. Only proposals scoring 80 points or higher will move to the presentation phase.

The following elements will be the primary considerations in evaluating all submitted proposals and in the selection of a Proposer:

- Completion of all required responses in the correct format.
- The extent to which Proposer’s proposed solution fulfills the stated requirements of WRCOG, CVAG, and SBCOG as set forth in this RFP.

- An assessment of the Proposer's ability to deliver the indicated services in accordance with the specifications set out in this RFP.
- The Proposer's stability, experience, and record of past performance in delivering services of similar projects.
- Availability of sufficient high quality personnel with the required skills and experience for the specific approach proposed.
- Overall cost of Proposer's proposal.

WRCOG may, at its discretion, and without explanation to prospective Proposer, at any time, choose to discontinue this RFP without obligation to such prospective Proposer.

15. PROPOSAL INFORMATION, ORGANIZATION, AND CONTENT

Proposer's proposal in response to this RFP will be incorporated into a final agreement between WRCOG and the selected Proposer. All proposals shall contain, at a minimum, the following information:

1. Cover Letter

The cover letter should be brief (two pages maximum), and provide a short synopsis of the Proposer's approach to completing tasks and delivering project final products. In order to address the needs of this procurement, WRCOG, CVAG, and SBCOG encourages Proposer's to work cooperatively in presenting integrated solutions. Proposer's team arrangements may be desirable in that they will enable the companies involved to complement each other's unique capabilities, while offering the best combination of performance, cost, and delivery for financial assistance being provided under this RFP. WRCOG, CVAG, and SBCOG will recognize the integrity and validity of Proposer's team arrangements provided that:

- The arrangements are clearly identified and relationships are fully disclosed; **and**
- A primary (lead) Proposer is designated who will be fully responsible for all contract performance; and
- The signature or electronic signature of the individual authorized/obligated to commit the Proposer to this project is included.

2. Title Page

The following must be provided on the title page:

- RFP number
- Title of the project
- Name and address of proposing firms and/or individuals
- Phone/Fax of Proposer
- Primary contact person
- Email address and phone number of the primary contact person

3. Table of Contents

This section should include a clear identification of the materials by section and page numbers.

4. Proposer's Capabilities

All proposals must provide a comprehensive description of the Proposer's capabilities including the following:

- Demonstrates direct experience within and understand the California Public Utilities Commission (CPUC) regulatory process. Including relevant legislation and regulations applicable to RENs and IOUs.
- Demonstrate an understanding of the REN formation process and have experience developing and submitting Business and Implementation Plans for CPUC approval.
- Demonstrates experience in working with the California Energy Efficiency Coordination Committee (CAEECC).
- Demonstrates experience with energy efficiency data analysis / market support.
- Demonstrates experience with energy efficiency program development and implementation. Creation of programs that involves emerging technologies, focus on low income and hard to reach communities, Workforce Education & Training, Multi-family, Direct Installation (DI) programs.
- Demonstrates experience with responding to questions from CPUC (Energy Division), CAEECC, and any other energy organizations.
- Demonstrate experience with designing and implementing energy efficiency programs that meet CPUC requirement and / or guidance
- Demonstrate experience with familiarity on applicable legislation and CPUC codes
- Demonstrate experience in projecting energy savings & cost effective analysis

5. Scope of Work

Please refer to Section 16 (Scope of Work) for detailed response requirements. Proposer is encouraged to propose enhancements or procedural or technical innovations to the Scope of Work that do not materially deviate from the objectives or required content of the project.

Proposer shall:

- Provide a narrative, which addresses the Scope of Work, and shows understanding of the needs and requirements of WRCOG, CVAG, and SBCOG.
- Describe the approach to completing the tasks specified in the Scope of Work. The work plan shall be of such detail to demonstrate the Proposers ability to accomplish the project objectives.
- Sequentially outline the activities that would be undertaken in completing the tasks and specify who would perform them.
- Furnish a project schedule for completing the tasks in terms of elapsed weeks from the project commencement date.
- Identify methods that Proposer will use to ensure quality control as well as budget and schedule control for the project.
- Identify any special issues, problems or risks that are likely to be encountered in this project and how the Proposer would propose to address them.

6. Schedule

Please include a detailed schedule which lists milestones and estimated completion dates of each of the tasks and sub-tasks listed in Section 16.

7. Detailed and Itemized Pricing

Please include a fee itemization for phases identified in Section 16 and any estimates of travel

expenses. Include all costs that may be relevant to the project. Also include, at a minimum, two scenarios of service levels and associated costs that account for the various phases for the development of a REN. Phase 1 will consist of creating a Business Plan for participating agencies to be presented and approved at the CPUC level. Additional components of phase 1 will also include data measurement, CAEECC review process, answering questions & answers from both CAEECC and CPUC. Phase 2 will consist of the coordination between IOUs for the Annual Budget Advice Letter (ABAL), creation & submittal of the Implementation Plan, Joint Cooperation Memo, energy measurements verification, and questions & answers. Additionally, if phase 1 does not receive final approval from the CPUC, then there will not be a need for phase 2 funding.

8. Appendix A: References

Please provide three (3) references, including names and contact information, for which you have performed similar work. References should not include any WRCOG, CVAG, and SBCOG staff or WRCOG, CVAG, and SBCOG Committee Members.

9. Appendix B: Project Team Staffing

Please include biographies and relevant experience of key staff and management personnel who would be assigned to the project. Please describe coverage levels of employees who would be assigned to this project. Affirm that no employees working on the engagement have ever been convicted of a felony.

10. Appendix C: Company Overview

Please provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary Standard Industrial Classification (SIC) numbers, address, main telephone number, toll-free number(s), and fax number(s).
- Primary key contact name, title, address (if different from above address), direct telephone and fax number(s).
- Person authorized to contractually bind the organization for any proposal against this RFP.
- Brief history, including year established and relevant experience with RENs (including Business Plan / Implementation Plan support, and coordination with CPUC, CAEECC, etc.)

16. SCOPE OF WORK

Intent: As noted in the introduction, the Coachella Valley Association of Governments (CVAG), San Bernardino Council of Governments (SBCOG), and the Western Riverside Council of Governments (WRCOG) are soliciting firms to assist with the development and implementation of a Regional Energy Network (REN) within San Bernardino County and Riverside County. This project will consist of 2 phases in which a Business Plan will be developed and submitted to the CPUC for approval to establish a REN in both San Bernardino & Riverside County. Phase 1 will also consist of Market Analysis study / identification of market barriers, California Energy Efficiency Coordinating Committee (CAEECC) stakeholder engagement / addressing feedback in regards to the Business Plan review process, and CPUC Energy Division review / response to request per the Business Plan review process. Phase 2 will include the selected Contractor working on drafting, review, and submittal of an Implementation Plan to the CPUC, assisting with the development of an Annual Budget Advice Letter (ABAL), assistance with the development of a Joint Cooperation Memo (JCM) that will involve coordination between the IOUs and drafting / review of energy efficiency metrics filing(s).

Specifically, CVAG, SBCOG, and WRCOG are seeking a qualified firm(s) to perform the following work:

Phase 1 – Business Plan

1. **Business Plan Development** – Contractor will coordinate with CVAG, SBCOG, and WRCOG to create a Business Plan that will be submitted to the California Public Utilities Commission (CPUC) for review and approval. The Business Plan will provide the framework which outlines the Programs and the various sectors (Municipal, Residential, and Commercial) that will be identified for energy efficiency support as part of the REN. The Contractor will assist with drafting, reviewing, and submitting the final report to the CPUC and assist with any comments that may arise. Contractor will utilize the CPUC developed template for Business Plan development.
2. **California Public Utilities Commission (CPUC) Energy Division support** – Contractor will assist all parties with reports, filings, and other documentation required to be filed with the CPUC, SCE, SoCal Gas, and any other agency for which filings are necessary or desired. Contractor will consult and recommend strategies in regulatory and compliance proceedings and draft related documents for submittal. Additionally, the contractor must be available to attend any meetings pertaining to REN development.
3. **Data Analysis / Market Analysis** – The Contractor will work with all parties to identify Programs that would find benefit for REN implementation as well as working on the metrics for energy efficiency measures analysis.
4. **California Energy Efficiency Coordinating Committee (CAEECC) Stakeholder support** – The Contractor will assist with support in the CAEECC review process. Assist CVAG, SBCOG, and WRCOG with any comments that would need to be addressed per their review and assist with final submittal.

Phase 2 - Implementation Plan

1. **Implementation Plan Development** – Contractor will assist with development of the required Implementation Plans based upon final CPUC developed template. Implementation Plan support will include adjusting / refining calculations for energy savings and Total Resource Cost (TRC) that will be implemented in the RENs program and the COGs portfolio; developing program logic models and process flows; confirming appropriateness of applicable work papers, software tools, and other supports required to claim savings.
2. **Annual Budget Advice Letter (ABAL)** – Per request of the CPUC, SCE and SoCal Gas, the contractor will assist with the development and submittal of the ABAL for review and approval. The work done on the ABAL includes providing feedback on Programs budgets, sector level metrics, and proposed Program and portfolio changes.
3. **Metrics Filings** – Support the COGs with the final set of energy efficiency business plan metrics based upon the final CPUC required portfolio and sector level metrics and other REN identified metrics.
4. **Utility Joint Cooperation Memo** – Contractor will assist with the development of the Joint Cooperation Memo between the lead agency and SCE and SoCal Gas.
5. **Ongoing Support** – The Contractor will assist the COGs with support in the fields of administrative,

technical, and regulatory support based upon the RENs ongoing needs after the Annual Budget Advice Letter.

Provide scenarios of the level-of-service costs for Phase 1 & Phase 2 (Interested bidders can submit pricing scenarios for both Phase 1 & Phase 2 or just one Phase based on expertise)

If Phase 1 does not receive approval from the CPUC, then Phase 2 will not be funded.

Attachment A

Regional Energy Network (REN) Development

Scoring Criteria

Proposals that meet the minimum responsiveness and responsibility requirements will be evaluated according to the following criteria and associated weights. Sub-criteria are equally weighted. Only proposal scoring 80 points or higher will move forward to the presentation process.

1. TECHNICAL APPROACH **30%**

Demonstrate knowledge of the scope of work and exhibit ability to identify and perform tasks and approaches that will efficiently meet all three COGs needs regarding implementation and creation of a Regional Energy Network.

- *Tasks & approach clearly described*
- *Creative/innovative approach*
- *Project intent has been met*

2. PROPOSER FIRMS **15%**

Qualifications of project staff, particularly key personnel including Project Manager. Demonstrate competence with completing the projects of similar scopes of work.

- *Familiar with regional and local issues*
- *Experience with similar projects of the same size and scope*
- *Demonstrate competence in working with public and private entities*

3. PROJECT MANAGEMENT/TEAM STAFFING **15%**

Overall, quality of logic of organization and staffing plan; appropriateness of labor distribution among the tasks; resources; and ability to meet project deadlines.

- *Qualifications of key individuals*
- *Time commitment of key individuals*
- *Demonstrate experience in each discipline proposed*

4. PROJECT COSTS **35%**

Provided realistic costs for services to be performed with inclusion of fee itemization by Section 16's phases, tasks, and deliverables.

- *Realistic cost for services to be performed*
- *Inclusion of fee itemization by Scope of Work phases, tasks, and deliverables*

5. REFERENCES **5%**

- *Similar projects completed on time and within budget*