

I. SPECIFICATIONS AND SCOPE OF WORK

2.1 Overview and Objective:

House Bill 21-1286, "Energy Performance for Buildings," passed the Colorado General Assembly on June 8, 2021 and will take effect September 6, 2021. The law directs the Colorado Energy Office (CEO) to appoint and convene a Task Force to develop building performance standard (BPS) recommendations to meet greenhouse gas (GHG) reduction targets of 7% by 2026 and 20% by 2030 from a 2021 baseline.

The objective of issuing this Documented Quote (DQ) is for CEO to select a Vendor to facilitate the Task Force, made up of building and efficiency experts, utility and industry stakeholders, and local government representatives. The BPS Task Force will convene monthly starting no later than October 1, 2021 and shall deliver recommendations on standards to the CEO Executive Director on or before October 1, 2022.

2.2. Work Tasks, Deliverables and Timeline

The Awarded Offeror shall perform the following work tasks and provide the following deliverables to CEO, each subject to CEO's final approval and discretion. It is anticipated that the Awarded Offeror will begin work immediately upon successful execution of a Purchase Order with CEO. All work related to the scope of work shall be completed by **October 31, 2022**.

- 1) Facilitate the Task Force
 - a) Develop a well-sequenced work plan and clear meeting agendas in collaboration with CEO to ensure Task Force makes progress towards its goals and stays on track to meet deadlines.
 - b) Work with CEO to provide Task Force members with the information, data, materials, and environment required to participate meaningfully and effectively. Note that the BPS Task Force may consider the following data and information in developing its recommendations:
 - benchmarking data reported pursuant to the requirements outlined in the statute;
 - benchmarking data from communities that are currently conducting commercial building benchmarking;
 - any other publicly available building benchmarking data through which benchmarking is reported to a building benchmarking program in Colorado; and
 - any other information that the office determines is available regarding energy use in commercial buildings in Colorado.
 - c) Prepare for, facilitate, and document Task Force meetings.
 - d) Prepare for, facilitate, and document up to 4 public meetings held by the Task Force.
 - e) Address areas of potential conflict or divergent interests between meetings as possible.

- f) Take notes during Task Force meetings to develop meeting summaries that are shared with Task Force members.
- g) Provide logistical and technical support for in-person or virtual meetings.
- 2) Project and Program Management
 - a) Work with CEO to coordinate the process, troubleshoot issues, communicate openly and regularly, and help ensure the process is set up to lead to a successful outcome.
- 3) Public Engagement
 - a) Assist the State in offering up to two accessible and inclusive opportunities for virtual public input into the proposed recommendations of the Task Force, in addition to supporting members to ensure their constituencies are involved and informed throughout the process.
 - b) Outline key milestones for community engagement
 - i) to solicit input on key issues and inform recommendations, and
 - ii) to review and help refine recommendations.
 - c) Work with CEO and Task Force to promote transparency and communications between the Task Force members, their constituents, and community stakeholders wherever possible throughout the process.
- 4) Compilation of the Task Force final recommendations
 - a) Draft the BPS recommendations based on decisions reached by the Task Force and circulate among Task Force members for review and approval
 - b) Prepare a final report with BPS recommendations based on a minimum of two-thirds consensus from Task Force members

Deliverables shall include the following:

1. Outline or roadmap of topics and information to be shared at each monthly meeting
2. Strategy document detailing the facilitator's approach to guide the Task Force and tools the Vendor will employ to get to consensus
3. Meeting minutes and key takeaways from each Task Force meeting.
4. Agendas, presentations, and resources aimed at helping Task Force members understand their roles and responsibilities
5. Draft document of BPS recommendations
6. Final report with BPS recommendations

2.3 Testing & Acceptance Criteria.

CEO shall determine whether deliverables meet the task requirements in the scope of work. The Awarded Offeror shall provide professional, high-quality deliverables that have gone through an internal quality assurance process. If the deliverables, invoices, and reports are inadequate, the CEO Program Manager will notify the Awarded Offeror with a request to correct, modify, or replace as needed.

2.4 Reporting

Awarded Offeror shall provide the CEO with a monthly activities report, any completed deliverables, and an invoice for services completed. Awarded Offeror shall participate in monthly

phone calls or in person meetings to provide updates on progress. Payment shall be contingent upon timely and complete submission of monthly invoices, not to exceed the budget categories outlined in the contract.

2.5 Minimum Requirements

The Awarded Offeror's team, including primes and subcontractors, is required to have the following minimum qualifications, which must be verifiable and clearly demonstrated in Offeror's response.

1. Five to ten years of experience in facilitating task forces or advisory groups and bringing teams to consensus to accomplish objectives.
2. Experience in the commercial, multifamily or public building sector with an emphasis on engineering, operating systems, or energy performance opportunities and costs.
3. Knowledge of building performance standards and metrics in effect or under consideration in other states and U.S. cities.
4. Knowledge of ENERGY STAR Portfolio Manager and how buildings benchmark their annual energy use.
5. Ability to adapt and be flexible to changing needs of the State and the Task Force

If Offeror(s) proposes to hire/use subcontractor(s) to perform any of the tasks as described in Section II, Specifications and Scope of Work, the DQ response must clearly indicate how the minimum qualifications are met from their subcontractors.

III. RESPONSE REQUIREMENTS

Offeror's response shall contain the following information, in the order and format provided below.

A. **Executive Summary** – In no more than one page, the Offeror shall furnish an executive summary to introduce the Offeror's firm and its qualifications and to provide a general overview of the Offeror's proposal. Include the same if using subcontractors. Any exceptions to this documented quotation for services must be detailed in the executive summary. The executive summary should include a statement confirming that the Offeror's firm has no real or potential conflict of interests that would prevent your firm from acting in the best interest of the CEO. If the Offeror intends to provide additions to the scope of work other than outlined above in Section II, it should be outlined here and further detailed under the Technical Qualifications section below.

B. **Minimum Qualifications** - In no more than two pages, summarize how the Offeror fulfills the minimum requirements, as described in Section 2.5.

C. **Technical Qualifications** - In no more than three pages, the Offeror shall identify its team members and describe their expertise and relevant project experience. Offeror shall attach resumes of each team member involved in this project (resumes not counted as part of the page limit).

D. **Project Experience** - In no more than two pages, the Offeror shall describe at least two (2) previous work products that resemble the services being requested in this scope of work. The example may differ in scope from the work tasks outlined herein; however, it must be similar in order to be satisfactory to CEO. The Offeror shall include the time frames, a description of the work deliverables completed, and total project cost from the example projects. The Offeror shall also include the team members' roles in the project and a reference from the project, including phone number and email address.

E. **Work Plan and Roles** – In no more than five pages, the Offeror shall provide a work plan and explain the team members' roles in the completion of the project. The work plan shall describe how the firm will perform the tasks and deliverables outlined in Section 2.2. The Offeror shall relate the role of each team member to the team member's technical qualifications and project experience. The Offeror shall include strategies for data collection, research and analysis methodology, quality control, timely delivery, and other key elements that will lead to a successful effort.

F. **Costs** -This is a firm-fixed-rate engagement. As part of its submission, the Offeror must provide a firm-fixed price bid for the entire engagement as detailed in the statement of work. The Offeror shall describe, in table format, the necessary commitment of personnel and resources for each task on an hourly basis. This table should be all-inclusive and the Offeror should anticipate any employee involvement to be reflected in the table. The Offeror shall estimate how many hours each team member will commit to the project, identify their hourly rates, and explain their role in the project. Travel and per diem costs for vendor travel relative to performance of services shall be reimbursed in accordance with State Fiscal Rule 5-1, as amended (refer to [https://www.colorado.gov/pacific/sites/default/files/Unofficial Fiscal Rules Chapter 5.pdf](https://www.colorado.gov/pacific/sites/default/files/Unofficial_Fiscal_Rules_Chapter_5.pdf) . It is expected that the travel rate for labor hours will be billed at half the full rate.

G. Offeror must include and sign the Documented Quote Cover Sheet.

IV. EVALUATION

Award determination will be based on the response deemed to be most advantageous to the State, at the State's sole discretion, utilizing the following criteria:

- A. Cost for services.
- B. Quality and thoroughness of proposed strategies to administer the project and achieve the required results within the set timeframe.
- C. Quality and depth of experience relative to the minimum requirements and scope of work.
- D. As applicable, the extent to which Offeror agrees or takes exceptions to Colorado's basic Purchase Order Terms and Conditions
- E. Completeness of submittal requirements outlined under Response Requirements

An evaluation will be made by CEO staff and other evaluators as may be appointed by the staff to judge the merit of quotations received in accordance with the evaluation criteria.