

BID COVER PAGE



Public Service Commission of Wisconsin

SIMPLIFIED BID REQUEST No.: PSC250001
THIS IS NOT AN ORDER

RETURN TO:
PSC PURCHASING
WI Public Service Commission
4822 Madison Yards Way
MADISON WI 53705

Title: Energy Use in State Facilities Report and Transition Plan
Date Issued: 09/03/2024
OEI Contact: Rita Hargot

BIDDER:

Telephone: 608-266-8776
Email: rita.hargot@wisconsin.gov

Submit Quote by: _____ Time: _____
Date: **10/04/2024** **1:00 pm CDT**

Fax/E-mail Quotes Accepted Fax/E-mail Quotes Not Accepted

Note to bidder: All replies shall reference the Simplified Bid Request number listed above

Quote price and delivery: **N/A**
Terms: N/A

Description	Total Cost
<p>Energy Use in State Facilities Report, process and methodology documentation, and stakeholder process for modernizing future reports for the Public Service Commission of Wisconsin, Office of Energy Innovation, according to the attached specifications, and terms & conditions.</p> <p>The report must cover the time period of July 1, 2023, to June 30, 2024. All deliverables must be completed and submitted by June 30, 2025, for a total cost not to exceed \$50,000.00.</p>	<p>\$ _____</p>

Addenda - This firm hereby acknowledges receipt / review of the following addenda (if any)
 Addendum # _____ Addendum # _____ Addendum # _____ Addendum # _____

- We claim minority Bidder preference [Wis. Stats. s. 16.75(3m)]. Under Wisconsin Statutes, a 5% preference may be granted to CERTIFIED Minority Business Enterprises. Bidder shall be certified by the Wisconsin Department of Administration. If you have questions concerning the certification process, contact the Wisconsin Department of Administration, 101 E. Wilson St., 6th Floor, Madison, WI 53703, (608) 261-2510. **Does Not Apply to Printing Bids.**
- We claim Wisconsin certified disabled veteran-owned business preference. Under Wisconsin Statutes, a 5% preference may be granted to CERTIFIED disabled veteran-owned business. Bidder shall be certified by the Wisconsin Department of Administration. If you have questions concerning the certification process, contact the Wisconsin Department of Administration, 101 E. Wilson St., 6th Floor, Madison, WI 53703, (608) 261-2510. **Does Not Apply to Printing Bids.**

In signing this Bid we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a Bid; that this Bid has been independently arrived at without collusion with any other Bidder, competitor or potential competitor; that this Bid has not been knowingly disclosed prior to the opening of Bids to any other Bidder or competitor; that the above statement is accurate under penalty of perjury.

We will comply with all terms, conditions and specifications required by the state in this simplified bid request and all terms of our Bid.

Name of Authorized Company Representative (Type or Print)	Title:	Phone:
		Fax:
Signature of Above	Date:	Bidder Email:

REV 02/2014	Description
	<p>MINORITY BUSINESS ENTERPRISE Are you a certified MINORITY BUSINESS ENTERPRISE (MBE)? You MUST BE CERTIFIED by Wisconsin Department of Administration (DOA). If you have questions concerning the certification process, contact DOA, 6th floor, 101 E. Wilson St., PO Box 7970, Madison, WI, 53707-7970, Telephone 608-67-9550, website: https://wisdp.wi.gov/. A 5% preference 'may' be granted for the quotation award to a CERTIFIED MBE. <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>DISABLED VETERAN-OWNED BUSINESS Are you a certified DISABLED VETERAN OWNED BUSINESS (DVB)? You MUST BE CERTIFIED by Wisconsin Department of Administration (DOA). If you have questions concerning the certification process, contact DOA, 6th floor, 101 E. Wilson St., PO Box 7970, Madison, WI 53707-7970, Telephone 608-267-9550, website: https://wisdp.wi.gov/. A 5% preference 'may' be granted for the quotation award to a CERTIFIED DVB. <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>VETERAN-OWNED BUSINESS Are you a "veteran owned business" as defined by s. 16.75(4)(d) and 16.755 Wis. Stats. means a small business, as defined in paragraph (c), that is certified by the Department of Veterans Affairs as being at least 51% owned by one or more veterans, as defined in s. 45.01(12) Wis. Stats. <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>SMALL BUSINESS Are you a small business as defined by s. 16.75 (4)(c) Wis. Stats. "small business" means a business which has had less than \$1.5 million gross annual sales in the most recent calendar of fiscal year. <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>SERVICES PERFORMED IN USA The services provided under this bid are all performed in the United States pursuant to s. 16.705 Wis. Stats. <input type="checkbox"/> YES <input type="checkbox"/> NO</p>

1.0 PURPOSE AND SCOPE

The Public Service Commission of Wisconsin’s (Commission) Office of Energy Innovation (OEI) invites and will accept bids/quotes for the preparation of the Energy Use in State Facilities Report (Report). The Report must cover the time period of July 1, 2023, to June 30, 2024. The State of Wisconsin owns more than 75,000,000 gross square feet (gsf) of buildings. Wisconsin Stat. § 196.025(7)(a)1 sets forth that OEI shall “[i]n cooperation with the other state agencies, collect, analyze, interpret, and maintain the comprehensive data needed for effective state agency energy planning and effective review of those plans by the governor and the legislature.” The Report includes a compilation of electricity, gas, coal, wood, water, steam, fuel oil, and sewer use in the major and cabinet agencies. Major agencies include: the University of Wisconsin System, Department of Administration, Department of Corrections, Department of Health Services, Department of Public Instruction, Department of Veterans Affairs, Department of Natural Resources, Department of Transportation, and the Wisconsin Housing & Economic Development Authority. Coordination with the Department of Administration, Office of Sustainability and Clean Energy will be required, aligning current efforts with the Clean Energy Plan’s “Lead by Example” initiative and preparing the dataset for future incorporation into an online database/repository. Previous year’s reports can be found on [OEI’s website](#): The OEI intends to, but is not required to, use the results of this bid process to award the contract(s) and/or issue a purchase order (the “Contract”).

2.0 CORRESPONDENCE, CLARIFICATIONS AND QUESTIONS

Bidders are expected to raise any questions, exceptions, or additions they have concerning the simplified bid request document by **September 17, 2024 to the OEI Contact listed on the bid cover page**. If a bidder discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this simplified bid request, the bidder shall immediately notify in writing the OEI Contact of the issue and request modification or clarification of the bid document.

All inquiries must be directed to the OEI Contact listed on the cover page (email contact is preferred method).

DATE	EVENT
September 3, 2024	Simplified Bid Request Issued
September 17, 2024, 1:00 PM CDT	Deadline for submitting Bidder written questions
September 24, 2024	Tentative date for State responses to Bidder questions
October 4, 2024, 1:00 PM CDT	Proposal due date

3.0 ADDENDA

In the event it becomes necessary, as determined by the OEI, to clarify any part of this simplified bid request, or to revise any part of this simplified bid request, the OEI shall send out an official addendum to all potential bidders. Bidders shall acknowledge the receipt/review of any addenda on the bid cover page.

The OEI has the sole authority to make modifications to this simplified bid request.

4.0 BIDDER QUALIFICATIONS

The bidder shall acquaint the OEI with the bidder’s qualifications for performing the work described in this simplified bid request by submitting appropriate documentation and/or through references for similar work performed, to the satisfaction of the OEI. As a prerequisite to the award of any Contract, the OEI must be satisfied that the bidder has sufficient qualifications for performing the work described in this simplified bid request.

In addition to the other prerequisites described in this simplified bid request, to be eligible for an award of Contract the bidder must complete the attached Bidder Response Sheet (Attachment C) and be able to demonstrate to the satisfaction of the OEI all of the following:

- 4.1 That the bidder is in the business of compiling account data from more than one thousand electric, natural gas, water, and sewer accounts. The bidder also must have experience in doing so continually for a minimum of the five years immediately prior to submittal of this simplified bid request.
- 4.2 That the bidder has experience with weather normalizing data. This includes using degree days to consider the impact of weather on fuel use. The bidder has experience providing actual energy use as well as “normalized” energy use for comparison purposes. The bidder also must demonstrate a minimum of five years of recent experience with this type of work.
- 4.3 That the bidder is familiar with calculating Site Energy Use Index (EUI) as compared with annual measures and benchmarks and would be comfortable evaluating and communicating (through a printed report)

multiple year trends and comparisons which would identify potential savings that will align agency energy use with goals set by the OEI.

- 4.4 That the bidder submitted documentation of the bidder's experience and qualifications in providing the services as described above. The submission should identify services provided, along with dates and results.
- 4.5 That the bidder supplied all references, along with a contact name and number for each reference listed, on the attached Bidder References Sheet (Attachment B), of companies / institutions / organizations to which similar service has been provided to a comparable-sized company / institution / organization.
- 4.6 That the bidder designated and named a "Contract Manager" to provide on-going communication, coordination of services, answers to questions, and issue resolutions; the bidder shall name the Contract Manager on the Bidder Information Sheet (Attachment A). The Contract Manager will act on the Contractor's behalf for all matters involving the contract. The Contract Manager will be the individual who assumes responsibility on behalf of the bidder for the bidder's performance.
- 4.7 That the bidder has experience with documenting and reporting on data methods, including data mapping and process methodologies.

5.0 CONTRACT TERM

The Contract will be for the preparation of the final Report for the period of July 1, 2023, to June 30, 2024. The Report must be completed and submitted by June 30, 2025.

6.0 METHOD OF BID

The bidder shall submit its bid to the Commission via email (preferred) to the email address indicated on the enclosed bid cover page.

If the Bidder is unable to submit their bid via email, they must contact the OEI Contact, at least five calendar days prior to the due date and time specified in this bid.

To be considered, bids must be received by October 4, 2024 at 1:00 p.m. CDT.

Bidder shall bid only for fixed costs as requested. Bid costs will include all costs associated with this service. All costs will be quoted in U.S. Dollars. Bidder shall not submit its own quotation sheet.

7.0 GENERAL REQUIREMENTS

The bidder, if selected to enter into the Contract, will perform all data analysis needed to complete the Report, as determined by OEI, and compile the data into the Report that covers the time period of July 1, 2023, to June 30, 2024. The bidder must complete the Report and all agreed upon datasets and transition documentation and submit it to the OEI by June 30, 2025.

8.0 SPECIFIC REQUIREMENTS

Bidders must understand the American Society of Heating, Refrigeration and Air-Conditioning Engineers (ASHRAE) guideline 14P (Measurement of Energy and Demand Savings) as well as the International Performance Measurement and Verification Protocol (IPMVP) for standard benchmarking and energy utilization indices, as this Report is also used to verify savings from energy conservation projects. Bidders must be familiar with [EPA Portfolio Manager](#) software and be prepared to add buildings to the existing account as well as update energy consumption data and gross square footage information as necessary, as determined by OEI.

The bidder, if awarded the Contract, will be required to synthesize and weather adjust utility and fuel information for more than 7,000 buildings and over 75,000,000 gsf of state-owned space. The bidder must also be prepared to normalize the data for weather and convert units into BTUs for the purpose of comparing all energy use. The bidder will update all of the buildings in EPA Portfolio manager, using the [Site Energy Use Intensity \(EUI\)](#) metrics below, for more than 75 million gsf of state-owned space. The EUI monthly/annual measures and benchmarks include:

- Electric kwh/ft² = electricity energy use (kwh) per building area gross square feet.
- Electric Watt/ft² = electric power (1000 watt = 1 kw) per building area gross square feet.
- Therm/ft² = natural gas energy use (therms) per building area gross square feet.
- Total Btu/ft² = total energy use (Btu) per building area gross square feet.
- Energy \$/ft² = energy costs \$ per square feet.
- EUI = Energy Use Intensity; ft² = gross square feet building area; kBtu = 1000 Btu; kwh = 1000 watt-hours; and therm =100,000 Btu

The bidder, if awarded the Contract, will be required to verify the gross square footage of the major agencies, account for campus meters (i.e. meters that include more than one building), and contact multiple utilities.

The bidder, if awarded the Contract, will need to independently measure and verify savings from conservation measures that are implemented in state-owned space. The bidder must use different units of measurement to accurately portray savings potential and compare savings across building types. The bidder must also be prepared to create a report showing the greenhouse gas equivalent (GHGe) pollution commensurate with the energy use in state facilities.

The bidder, if awarded the Contract, will be required to produce a Report which contains fiscal year 2024 (July 1, 2023, through June 30, 2024) energy expenditure information (both cost and usage) for electricity, natural gas, fuel oil, coal, wood pellets, select water, and sewer. The Report should be written in plain language, show trends in energy use over the agreed upon baseline (currently FY 2005), and contain various charts and graphs that illustrate this information. Reports from prior years can be found on the [OEI's website](#).

The successful bidder will also be expected to provide comprehensive guidance on this process from beginning to end, detailing each step involved in the project. This includes developing a clear and structured methodology for data collection, analysis, and reporting. This will inform a transition process to be developed to modernize the data and report(s) to be used more effectively by stakeholders. The selected bidder must also assist OEI in accessing necessary utility accounts, ensuring that all relevant information is obtained efficiently. This involves identifying and listing all required utility accounts and making arrangements to gather the data.

Furthermore, the successful bidder will be required to compile the findings and activities into a detailed summary report, presenting a clear and concise overview of the process, results, and any recommendations for future actions. The bidder also must help the OEI reevaluate and incorporate new facilities, ensuring that all changes are accurately reflected in OEI data and reports.

Transition Stakeholder Group Discussion

- **Participation in Transition Year Stakeholder Sessions:** Bidders, if awarded the contract, must participate in stakeholder sessions during the performance period to gather input on stakeholder needs.
- **Establish Transparency in Data Collection:** Bidders, if awarded the contract, are required to incorporate data mapping techniques to establish transparency in collecting and managing data.
- **Preparation for Data Audits:** Bidders, if awarded the contract, must assist in preparing for potential data audits by establishing robust documentation and processes that verify the accuracy and completeness of the collected data.
- **Process Documentation:** Bidders, if awarded the contract, will produce an up-to-date process document that includes:
 - A list of all accounts accessed per building.
 - Data files supporting the data collection and analysis process.
 - Data in kilowatt-hours (kWh), ensuring all energy usage is accurately documented and quantified.
- **Reassess Baseline Data:** Bidders, if awarded the contract, are expected to reassess and update the baseline data, as required to reflect any changes or new information.
- **Meter Numbers and Data Sources:**
 - Bidders, if awarded the contract, will provide a list of meter numbers that received direct data requests from contractors.
 - Bidders, if awarded the contract, will identify meter numbers or facility locations whose data is obtained via open-source data.
- **Provision of Historical Data:** Bidders must be able to provide historical data upon request, facilitating the transition to new methodologies and supporting stakeholder use.

9.0 SUBCONTRACTING OR THIRD-PARTY PAYMENTS

All subcontracting must be pre-approved by OEI. Subcontractors shall abide by all terms and conditions of the Contract. The bidder, if awarded the Contract, shall be responsible for all subcontractor(s) work and payment. The OEI will not directly pay any subcontractor or third parties.

10.0 FIRM PRICING

The bidder, if awarded the Contract, shall complete all work for the final cost submitted in the bid, and not to exceed \$50,000. Additional note to bidder: **ANY** additional charges in excess of the contracted rates such as sales tax,

delivery charges, travel time charges, environmental charges, fuel surcharges, other or miscellaneous charges or expenses, etc. will not be reimbursed. The bidder must incorporate any such charges into its initial bid.

11.0 METHOD OF AWARD

Award(s) will be made on the basis of the lowest cost on the **bid cover page** from the bidder who meets the specifications as determined by the OEI.

OEI does not guarantee to purchase any specific quantity or dollar amount of service and may purchase no services.

12.0 CONTRACT CANCELLATION

Any Contract awarded from this bid process may be terminated by either party at any time upon 60 days written notice served by certified mail upon the other party. OEI will not reimburse bidder for any activities of its employees and subcontractors after termination, unless pre-approved by the OEI for transition purposes.

13.0 TRANSITION SERVICES

In addition to the transition deliverables described in other sections of this Agreement, this section shall apply. Upon cancellation, termination, or expiration of this Agreement for any reason, the Contractor shall provide such reasonable cooperation, assistance, and services, and shall assist the Commission in the migration of the production operations to the Commission's control or to the control of an alternative contractor upon written notice and at least 60 business days prior to termination or cancellation, and subject to the terms and conditions set forth herein. In addition to any agreed upon extension period, this Agreement shall automatically be extended by the number of days that training or continued Services are necessary to be performed in order to complete the transition. The Contractor's Services required to complete the transition after the notice set forth herein shall be within this Agreement's scope and shall not be the subject of any change order.

14.0 CONFIDENTIALITY

The bidder acknowledges that some of the data and documentation it may become privy to during the performance of the Contract may be confidential. The bidder shall make all reasonable efforts to identify confidential information and to ensure that the bidder or its employees and subcontractors do not disseminate such confidential information.

The bidder or its employees and subcontractors shall not reuse, sell, or make use in any format the data researched or compiled or accessed for the Contract for any venture, profitable or not, outside the Contract. The bidder shall observe complete confidentiality with respect to all aspects of any confidential information, personally identifiable information, proprietary data and/or trade secrets and any parts thereof, whether such contents are OEI's, the bidder's, or another party's.

The confidentiality restrictions stated above would survive the termination of the Contract and continue in full force and effect and be binding upon the bidder and its agents, employees, successors, assigns, subcontractors, or any party claiming interest in the Contract on behalf of or under the rights of the bidder following any termination. The bidder shall advise all of the bidder's agents, employees, successors, assigns, and subcontractors that are engaged through the Contract of the restrictions, present and continuing, set forth herein. The bidder shall defend against, and incur all costs for, actions that arise as a result of noncompliance by the bidder, its agents, employees, successors, assigns, and subcontractors under this section.

15.0 CERTIFICATION FOR COLLECTION OF SALES AND USE TAX

The OEI will not enter into a Contract with a bidder or contractor, and reserves the right to cancel any existing Contract, if the bidder or contractor has not met or complied with the requirements of Wis. Stats.s.77.66, and related statutes regarding certification for collection of sales and use tax. The bidder should visit the [WI Department of Revenue's website](#) to find answers related to this certification provision.

16.0 FEDERAL SUSPENSION AND DEBARMENT

Federal Executive Order (E.O.) 12549 "Debarment" requires that all contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government. By signing this procurement document, you certify that your organization and its principals are not suspended or debarred. Failure to comply or attempts to edit this language may disqualify a bid.

17.0 REQUIRED FORMS

In order for a bid to be considered complete, the following completed documents must be provided at the time of bid submittal. An "X" preceding the form indicates that it must be completed and returned with the bid response by the due date and time listed on the bid cover page. **Include the bid number on all documentation. In the event of an addendum, resubmit forms with the most current bid number.**

Include:

x	Bid Cover (Signature) Pages	Bid Cover Page
x	Bidder Information Sheet	Attachment A
x	Bidder References Sheet	Attachment B
x	Bidder Response Sheet	Attachment C

Failure to provide the required documents/information within a bid submittal may disqualify the bid.

BIDDER INFORMATION SHEET
Attachment A

1. BIDDING / PROPOSING COMPANY NAME _____
Phone () _____ Toll Free Phone () _____
Fax () _____ E-Mail Address _____
Address _____
City _____ State _____ Zip + 4 _____
2. CONTRACT MANAGER (the person to contact for questions concerning this bid / proposal).
Name _____ Title _____
Phone () _____ Toll Free Phone () _____
Fax () _____ E-Mail Address _____
Address _____
City _____ State _____ Zip + 4 _____
3. Any bidder awarded over \$50,000 on this Contract shall submit affirmative action information to the department. Please name the Personnel / Human Resource and Development or other person responsible for affirmative action in the company to contact about this plan.
Name _____ Title _____
Phone () _____ Toll Free Phone () _____
Fax () _____ E-Mail Address _____
Address _____
City _____ State _____ Zip + 4 _____
4. Mailing address to which state purchase orders are mailed and person the department may contact concerning orders and billings.
Name _____ Title _____
Phone () _____ Toll Free Phone () _____
FAX () _____ E-Mail Address _____
Address _____
City _____ State _____ Zip + 4 _____
5. CEO / President Name _____

BIDDER REFERENCES SHEET
Attachment B

FOR BIDDER: _____

Provide company name, address, contact person, telephone number, and appropriate information on the service(s) provided to four (4) or more comparable-sized companies/institutions/organizations. The services must be similar to those included in this simplified bid request. If bidder is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

Company Name _____

Address (include Zip + 4) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Company Name _____

Address (include Zip + 4) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Company Name _____

Address (include Zip + 4) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Company Name _____

Address (include Zip + 4) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

This document can be made available in accessible formats to qualified individuals with disabilities.

BIDDER RESPONSE SHEET
Attachment C

Bidders shall submit the following table with a response **in the form of a check** in one box for each criterion indicating “Yes” or “No”. A check indicating “Yes” certifies that the bidder is fully capable of providing the service or qualification described. **Bids without a response for each requirement or “No” will be rejected.** The bidder who is awarded the Contract shall be able to answer “Yes” to all requirements.

QUALIFICATIONS AND REQUIREMENTS

Section	Requirement Description	YES, I <u>can</u> meet this requirement	NO, I <u>cannot</u> meet this requirement
4.1	Bidder has been in the business of compiling account data from more than one thousand electric, natural gas, water, and sewer accounts for at least the past five (5) years.		
4.2	Bidder has experience weather normalizing data for at least the past five (5) years.		
4.3	Bidder is familiar with calculating Site Energy Use Intensity (EUI) as compared with annual measures and benchmarks and would be comfortable evaluating and communicating (through a printed report) multiple year trends and comparisons which would identify potential savings that will align agency energy use with goals set by the energy office.		
4.6	Bidder awarded the Contract, shall designate a person as the “Contract Manager” to provide communication, coordination of services, answer questions, and resolve issues.		
7.0	Bidder shall meet the requirements of this section while complying with all applicable codes / standards, etc.		
8.0	Bidder shall meet all specific requirements in this section.		
14.0	Bidder shall meet and adhere to the confidentiality requirements defined in ¶ 14.0 of the simplified bid request.		

I certify that the information I have provided in this bid is true, and I understand that any false, misleading, or missing information will disqualify the bid.

Company Name: _____

Bidder’s Name and Title: _____

Bidder Signature: _____ Date: _____