

San Diego County Sample RFP Template

REQUEST FOR PROPOSAL (RFP) TEMPLATE:

Installation and Operation of Electric Vehicle Charging Stations

The following is a Request for Proposal (RFP) template that provides recommended headings and proposal language to assist in the issuance of an RFP for Electric Vehicle Charging Stations. In the outline, a brief summary is provided for each heading and this information can and should be customized for each individual RFP.

Disclosure: *Proposals shall be kept confidential until a contract is awarded. The <insert jurisdiction> reserves the right to request clarification of any proposal term from prospective suppliers. Selected supplier(s) will be notified in writing. Any award is contingent upon the successful negotiation of final contract terms. Negotiations shall be confidential and not subject to disclosure to competing suppliers unless and until an agreement is reached. If contract negotiations cannot be concluded successfully, the <insert jurisdiction> reserves the right to negotiate a contract with another supplier or withdraw the RFP. Any contract resulting from this RFP shall not be effective unless and until approved by the <insert jurisdiction Council>.*

1. Overview of the Project

Requesting proposals from suppliers to fully fund, design, install, operate, maintain, market, and potentially remove electrical vehicle (EV) charging stations, also known as Electric Vehicle Supply Equipment (EVSE), on publically-owned property for public use. This work will also include assisting the jurisdiction in identifying ideal site locations for the EVSE installations.

2. Acronyms/Definitions

A glossary of the necessary acronyms and definitions used throughout the RFP (e.g. “Supplier” – Organization/individual submitting a proposal in response to this RFP)

EVSE – Electric Vehicle Supply Equipment

3. Scope of Project

The Scope of the Project is as follows:

- Provide attractive and well-maintained EVSE.
- Cover all costs associated with installation, maintenance, and electricity for the EVSE. The supplier may establish a service charge and method of payment collection to recoup these costs as well as any operating profit from EVSE users.
- Provide proper EV parking signage and reconfiguration of any parking stalls for EV parking.

- o Market the project as well as provide product advertisement.
- o Offer options for EVSE when the agreement expires (e.g. charging unit removal, transfer of ownership, contract renewal options).
- o The <insert jurisdiction> to provide the required parking spaces to accommodate the EVSE within the parking facilities at no cost to the supplier.

4. Additional Considerations

- A. The supplier must agree to insurance and liability requirements (scope and coverages) set by the jurisdiction and state such in its proposal.

<Jurisdiction to insert summary of applicable insurance and liability requirements here and/or can attach full description to end of this template.>

- B. <Jurisdiction can add any additional considerations here. For example, if City offers/restricts use of advertisements on or around EVSE.>

5. Submittal Instructions

For questions regarding this RFP, submit all inquiries via email to <insert email address> by <insert due date>. Responses to the questions will be posted <insert where responses will be made available> no later than <insert date>. All proposers are recommended to visit the above mentioned <insert jurisdiction> website on a regular basis as responses will be posted when available.

Proposal Evaluation Process Timeline

<u>TASK:</u>	<u>DATE/TIME:</u>
Deadline for submitting questions	<Insert date>
Answers to all questions submitted	<Insert date>
Pre-Submission conference/meeting	<Insert date>
Deadline for submission of proposals	<Insert date>
Evaluation period	<Insert date>
Selection of supplier	<Insert date>

MANDATORY SITE VISITS

Site visits are scheduled as follows for potential EVSE suppliers to gather data and further assess proposed sites. The dates and times identified will be the only opportunity to view the proposed sites. Failure to attend the mandatory site visits will result in automatic disqualification with no further consideration for award.

<u>PROPOSED SITE</u>	<u>DATE OF VISIT</u>	<u>TIME</u>	<u>CONTACT</u>
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NOTE: The dates above represent a tentative schedule of events. The <insert jurisdiction> reserves the right to modify these dates at any time, with appropriate notice to prospective suppliers.

Suppliers shall submit one (1) original proposal marked "ORIGINAL" and four (4) identical copies to the following:

<Insert Jurisdiction Name>

<Insert Contact Name>

<Insert Address>

Proposals shall be clearly labeled in a sealed envelope or box as follows:

REQUEST FOR PROPOSAL NO.: <insert proposal number>

FOR: Electric Vehicle Charging Stations

Disclosure: *Proposals must be received by <insert date and time>. Proposals that do not arrive by the specified date and time WILL NOT BE ACCEPTED and will be returned unopened. Suppliers may submit their proposal any time prior to the above stated deadline. E-mail or fax submissions will not be accepted.*

At its sole discretion, the <insert jurisdiction> may reject incomplete proposal submittals if, in its judgment, the submittal lacks information needed to effectively evaluate the proposal. Nothing in this request for qualifications implies a contractual obligation with any firm, nor will the <insert jurisdiction> reimburse costs for submittal preparation.

Proposal Format:

Supplier Information:

- The legal name of the supplier, address and telephone number.
- The structure of the organization (e.g., sole proprietorship, partnership, corporation, etc.) including state of formation.
- The name, address and telephone number of the person to whom correspondence should be directed.
- The year the company was established as currently being operated.
- A certified financial statement, including, but not limited to a Dun and Bradstreet rating.

Supplier Background & Work Experience:

- A list of all communities within the San Diego Gas & Electric (SDG&E) service territory in which the supplier has provided and maintained publicly-available EVSE during the last five years, if applicable. Please list communities with active EVSE and communities where EVSE have been removed. Also include the following information for each community:
 - Name of the organization that contracted with you for EVSE sites. Please include the name of a contact person and phone number.
 - Was the contract/franchise exclusive or nonexclusive?
 - Number of EVSE provided.
 - Time period that the EVSE were installed.
 - Reporting sales & usage (sample reports)

- A list with additional California communities, and/or communities in United States in which the supplier has provided and maintained publicly-available EVSE during the last five years, if applicable. Include all of the information identified in the previous bullet.
- Please list any public agencies that have chosen to cancel or not renew EVSE contracts with your firm during the last five years. Show names of organizations and names and phone numbers of persons who can be contacted.
- Provide qualifications of the local contractors that will perform the EVSE installations. Demonstrate that the supplier is working with C-10 licensed electrical contractors employing California state-certified electricians to handle EVSE installations and maintenance.
 - List any EVSE-specific trainings or certifications that the supplier's electrical contractor and/or the contractor's electricians have completed, if applicable (e.g. The Electric Vehicle Infrastructure Training Program (EVITP) or UL training).
 - Include the number of EVSE installations completed to date by the supplier's electrical contractor and/or the contractor's electricians.
- Demonstrate an understanding of <insert jurisdiction> processes, required permits, permit costs, licenses, applicable state and local codes specific to EVSE and procedures for this type of project.

Scope of Work:

- A written and pictorial description of the proposed EVSE design, including:
 - Comprehensive specifications (including make, manufacturer, & model numbers of equipment).
 - Delivery and proposed installation schedule.
 - The submission of more than one type of charging station is permitted, however, if the selection of any particular design would result in a change to the proposed rate structure and method of collection, those changes must be noted.
- Metering configurations identifying how the supplier will provide the electricity to the EVSE end consumer at no cost to the jurisdiction.
 - Process and schedule for reimbursement to the jurisdiction for cost recovery of electricity provided to EVSE (if applicable).
- Proposed EVSE end consumer rate structure (e.g. charging customers per kWh usage or plug time) and customer method of payment (e.g. credit card reader for universal usage or restricted access for only network users).
- Description of the proposed EVSE maintenance program including the location of maintenance facilities, number of staff that will be available for maintenance, and anticipated response times.
- Description of ability and staff expertise to provide services including marketing, installation, monitoring, and maintenance of EVSE.
 - Quality control/safety features.
 - Marketing plan details and available resources.
- Financial incentives to the <insert jurisdiction> (if applicable).
- Options for EVSE when the agreement expires (e.g. charging unit removal, transfer of ownership, contract renewal options) and responsible party for any costs incurred (if applicable). Highly preferred that the supplier cover any removal costs.

Additional Items:

- The proposal must be signed by the individual(s) legally authorized to bind the supplier.
- If complete responses cannot be provided without referencing supporting documentation, such documentation must be provided with the proposal and specific references made to the tab, page, section and/or paragraph where the supplemental information can be found.

6. Proposal Evaluation & Award Process

Proposals will be evaluated based on the following criteria (please reference attached *RFP Criteria Review Template*):

- Current and past supplier performance in similar contracts with other agencies.
- Financial stability of the proposer as reflected in a certified financial statement or other certified statement, including but not limited to a Dun and Bradstreet financial rating.
- EV customer rate structure and method of customer payment that will be used to charge customers.
- Description of metering configuration.
- Process and schedule to reimburse the jurisdiction in order to recoup cost of electricity used to provide EVSE (if applicable).
- Maximum public benefit (i.e., in terms of affordability and customer support).
- Strength, quality, durability, advanced technology, future flexibility, and aesthetic appeal of proposed EVSE.
- Proposed maintenance, repair and replacement schedule including response times for malfunctioning EVSE (e.g. supplier's proximity to the <insert jurisdiction> and number of proposer's employees performing maintenance functions).
- Possible commitment to providing additional EVSE at other <insert jurisdiction> owned parking facilities (desirable but not required).
- Supplier's specific marketing strategy that includes product advertising.
 - EVSE installation marketing plan.
 - Description of the supplier's available marketing resources.
- Proposed options for EVSE (e.g. system removal, transfer of ownership, contract renewal options) when the agreement expires and potential costs to the jurisdiction.

Suggestion for Jurisdiction: Create a scoring criterion that may include assignment of percentages and/or weighting each criterion listed above.

7. Project Specifications

- Provide installation site plans (if applicable [for reference, please see Exhibit A of the City of Long Beach RFP No. PW12-016]).

8. Subcontractor Information and Business License

Does this proposal include the use of subcontractors?

Yes _____ No _____ Initials _____

If “Yes”, supplier must:

- Identify specific subcontractors and the specific requirements of this RFP for which each proposed subcontractor will perform services.
- The <insert jurisdiction> requires that the awarded supplier provide proof of payment of any subcontractors used for this project. Proposals shall include a plan by which the <insert jurisdiction> will be notified of such payments.
- Primary contractor shall not allow any subcontractor to commence work until all insurance required of subcontractor is obtained.

BUSINESS LICENSE

<Insert Jurisdiction> requires all businesses operating in the <insert jurisdiction> to pay a business license tax. In some cases the <insert jurisdiction> may require a regulatory permit and/or evidence of a State or Federal license. Prior to issuing a business license, certain business types will require the business license application and/or business location to be reviewed by the Development Services, Fire, Health, and/or Police Departments.

9. Cost

- N/A

10. Terms, Conditions and Exceptions

<Insert project specific terms, conditions and exceptions>

To view an example, please reference section 9 of the City of Long Beach RFP No. PW12-016.

<Insert individual public liability and insurance requirements for your agency>