

ENERGY PERFORMANCE PROJECT SERVICE QUESTIONNAIRE

DEPARTMENT OF TECHNOLOGY, MANAGEMENT AND BUDGET FACILITIES & BUSINESS SERVICES ADMINISTRATION

FILE NO.
INDEX NO.
DEPARTMENT OF

ENERGY PERFORMANCE PROJECT
_____, MICHIGAN

PURPOSE:

This questionnaire will be used by the Department of Technology, Management and Budget and an ad hoc advisory committee for the purpose of making an initial evaluation of potential firms interested in providing Design and Construction Consultants (D/CC) services for the implementation of an energy performance project with guaranteed energy savings for the Michigan Department of _____, within their _____.

The overall services will involve the following phases:

- Design Services
- Project Management Services
- General Conditions
- Construction Services
- Overhead and Profit Flat Fee

The project scope will consist of implementing a recently completed detailed Technical Energy Assessment Audit. This assessment conducted by _____.
The assessment documents all current facility conditions, facility baseline energy consumption, _____ recommended energy conservation measures (ECM's), estimates energy cost savings, estimates installation costs, and establishes measurement and verification requirements. _____.
The completed Technical Energy Assessment Audit is included for use and reference.

This audit will serve as the basis of a comprehensive energy performance project including but not limited to design, construction specifications, procurement, construction supervision, installation, start-up, commissioning, guaranteed energy savings, monitoring and verification of energy savings as well as training & warranty response to implemented ECM's. Questionnaire response and eventual project implementation shall be based on the recommended and documented ECM's. ECM revisions or alterations will not be permitted.

Preference will be given to firms located in the State of Michigan.

Firms interested in the project are invited to complete the attached questionnaire. The **completed questionnaire and four (4) copies (5 Total)** and a **current copy of your Certificate of Awardability, Signed Qualified Disabled Veteran (QDV) Business Representation Form, Signed Certification of a Michigan Based Business Form, and Signed Responsibility Certification Form**, must be returned to Facilities & Business Services Administration, **no later than 2:00 p.m., local time, on** _____.

INFORMATION:

An ad hoc advisory committee will evaluate all returned questionnaires. Only those firms determined to be best qualified for the project will be invited to submit a technical and cost proposal.

The committee will make a numerical evaluation of all questionnaires received based on each firm's organization, understanding of the project, firm's opinion of the completed audit, personnel, project experience, references, financial capability, and bonding capacity.

DEFINITIONS:

"Branch Office" is a satellite, or subsidiary extension, of a headquarters office of a company, regardless of any differences in name or legal structure of such a branch due to local or state laws. Branch offices are normally subject to the management decisions, bookkeeping, and policies of the main office.

"Parent Company" is that firm, company, corporation, association or conglomerate which is the major stockholder or highest level owner of the firm completing this questionnaire; I.E., Firm A is owned by Firm B which is, in turn, a subsidiary of Corporation C. The parent company of Firm A is Corporation C.

"Joint Venture" is a collaborative undertaking of two or more firms or individuals for which the participants are both jointly and individually responsible.

INSTRUCTIONS FOR FILING:

Submit your original questionnaire and four (4) copies (**5 Total**) of this questionnaire, and a current copy of your Certificate of Awardability, to Facilities & Business Services Administration, First Floor, Stevens T. Mason Building, P.O. Box 30026, Lansing, Michigan 48909, and identify the envelope "_____, ENERGY PERFORMANCE PROJECT." **NOTE:** Security measures may affect the delivery time of mail and packages sent via UPS, Fed Ex, and Airborne Express. Those hand-delivering their proposal should be prepared to present a pictured identification to the security guard on duty in the lobby of the Stevens T. Mason Building and allow extra time for their proposal to reach Facilities & Business Services Administration. It remains the responsibility of the professional firm to submit request for proposals as specified. Please allow ample time to arrive at the office prior to the 2:00 p.m. deadline.

(Numbers 1 through 10 below corresponds to numbers contained on the form):

1. a. Type complete name, address, and zip code of submitting firm.
b. Indicate whether questionnaire is being submitted in behalf of a parent firm, a branch office, or a joint venture, and year established.
2. **CERTIFICATE OF AWARDSABILITY:** The Contractor must not discriminate on the basis of religion, race, color, national origin, age, sex, marital status, height, weight, arrest record or disability. Prior to the award of any Contract of \$100,000.00 or more, the Michigan Department of Technology, Management and Budget (DTMB) Contract Compliance Representative will notify the Michigan Department of Civil Rights (DCR) Contract Compliance Representative, providing a bid tabulation and providing a description of the recommended awardee(s) including business(es)' name, business(es)' designated contact person, last four digits of company(ies)' tax identification number, business(es)' address, and business(es)' contact person telephone number. In the event a contractor doesn't possess a valid Certificate of Awardability and is the most qualified low bidder, the contractor must immediately submit, upon notification by DTMB, their application to DCR. **DO NOT SUBMIT APPLICATION TO DCR UNLESS YOU ARE THE LOW BIDDER.**

The time required by DCR to process and render a decision on such application is nine (9) calendar days from the date of transmission of bid tab information by DTMB to DCR. Communications concerning Certificates of Awardability should be directed to:

Michigan Department of Civil Rights
Business and Community Affairs
Cadillac Place
3054 West Grand Boulevard, Suite 3-600
Detroit, Michigan 48202
Telephone: (313) 456-3822
Fax: (313) 456-3826
3. Enter type of ownership, or legal structure, of firm (sole proprietor, partnership, corporation, etc.) (For statistical purposes only.)
4. Branches or subsidiaries of larger or parent companies, or conglomerates, should insert name and address of highest level owner.
5. List not more than two principals from submitting firm who may be contacted. Listed principals must be empowered to speak for the firm on policy and contractual matters.

6. a. Beginning with the submitting office, list name, location, telephone numbers, and total number of personnel for all associated or branch offices which provide professional services. Show total personnel in all offices. (Should be sum of all personnel, all branches or joint venture.)

b. If submittal is from a joint venture, identify each firm.
7. Provide brief resumes of key personnel expected to participate on this project. Care should be taken to limit resumes to only those personnel and specialists who will have major project responsibilities. Each resume must include: a) title of each key person and specialist; b) the project assignment or role that person will be expected to fulfill in connection with this project; c) the highest academic degree achieved and the discipline covered (if more than one discipline rate highest, list both), the year received, and the particular technical/professional discipline which that individual will bring to the project; d) if registered as an architect, engineer, surveyor, etc., show only the field of registration and the year that registration was first acquired, if registered in states other than Michigan, list states; and e) a synopsis of experience, training, or other qualities which reflect an individual's potential contribution to this project. Include such data as: familiarity with state regulatory agency procedures, similar type of work performed in the past, management abilities, familiarity with the general area of the project, etc. Please limit synopsis of experience to directly relevant information.
8. Describe projects of the firm that best illustrate experiences applicable to this project. Describe your firm's responsibility or role in the project. Briefly describe the scope, details, magnitude, project cost, overall deliverables, schedule, completion date, and performance with guaranteed energy savings.
9. Indicate your firm's present project workload: projects in design, projects in construction and new projects that have not started.
10. Provide, through narrative discussion, reasons why the firm is especially qualified to undertake the project. Information provided should include, but not be limited to, such data as: experiences with energy performance projects or related operations. Any awards or recognition received by the firm or individuals for similar work, special approaches or concepts developed by the firm appropriate to this project, financial capacity, etc. Respondents may say anything they wish in support of their qualifications.

A principal of the firm, preferably the chief executive officer, should sign the completed questionnaire.

Additional data, brochures, etc., SHOULD NOT accompany this form.

Firms responding to this questionnaire shall not seek the identity, or attempt to contact committee members and members of the department.

Failure to conform to the above instructions may result in disqualification.