



REQUEST FOR PROPOSALS

Oklahoma Commercial Property Assessed Clean Energy Program Development

Release Date: November 26, 2019

I. PURPOSE

The Indian Nations Council of Governments (INCOG) is soliciting proposals from qualified firms with expertise in Commercial Property Assessed Clean Energy (C-PACE) Programs for the purpose of designing and developing a uniform and replicable C-PACE Program for counties in Oklahoma.

II. BACKGROUND

INCOG is a voluntary association of local and tribal governments in the Tulsa Metropolitan area in Northeast Oklahoma, one of eleven councils of governments in the state. Working through a voluntary assembly of area elected officials and public-private partnerships, INCOG provides regional planning and coordination services for member governments and their constituent organizations to assist in creating solutions to challenges in such areas as land use, transportation, community and economic development, environmental quality, public safety, and services for older adults.

C-PACE is a voluntary, open-market financing tool to accelerate private investment throughout Oklahoma by enabling low-cost, long-term private funding to commercial property owners for energy efficiency, renewable energy, water conservation, and resiliency projects through low-interest loans tied to the property as an assessment on the owners' property tax bill which remains with the property upon transfer of property ownership.

In May 2019, the Oklahoma legislature passed SB 1000 authorizing Oklahoma counties to establish C-PACE programs for properties zoned commercial within their jurisdictions. Tulsa County has been the driving force behind this effort. A September 2019 Tulsa County Board of Commissioners (BOCC) Resolution expressing intent to develop a program was followed in October by a Memorandum of Understanding (MOU) with the Indian Nations Council of Governments (INCOG), the Oklahoma Office of the Secretary of Energy & Environment, and the Oklahoma Department of Commerce to place INCOG as program sponsor to lead the development of a commercial C-PACE Program for Tulsa County with the goal of producing a statewide template for other counties to quickly replicate throughout Oklahoma, thereby minimizing program variability among counties.

III. SCOPE OF SERVICES

In consultation and collaboration with INCOG and the Oklahoma C-PACE Statewide Steering Committee, contractor is expected to provide the deliverables below. If contractor determines more is needed to establish a viable, robust, C-PACE program in Oklahoma, please address this in your proposal.

Deliverable 1. Advisement, collaboration, and consultation with INCOG and Steering Committee throughout project entirety. Timely communication is expected. We anticipate a minimum of three on-site meetings;

Deliverable 2. Legal research and analysis of existing state and local laws, ordinances, tax and administrative procedures, resolutions, building and energy codes, and other regulatory policies necessary for establishing C-PACE in Oklahoma;

Deliverable 3. Consultation and collaboration with INCOG and Steering Committee culminating in the development of a complete Oklahoma C-PACE Program Administrative Platform, consisting of:

- A uniform Oklahoma C-PACE Policy, Procedures, and Guidance Manual designed for use and streamlined modification as may be necessary by counties wishing to adopt and implement programs;
- Uniform Oklahoma C-PACE Documents (contract documents, forms, applications, checklists, etc.), in template format;
- Uniform Oklahoma template-style C-PACE County Resolution;

Deliverable 4. Recommendations for Oklahoma C-PACE Program Administration, including roles and responsibilities, expertise, funding/fee mechanisms, criteria for reviewing and approving capital providers, and program marketing;

Deliverable 5. Assistance with Tulsa County C-PACE Program Platform adoption and contracted 3rd Party Administrator set-up;

Deliverable 6. Recommendations for accelerating growth of C-PACE throughout other Oklahoma counties.

IV. Anticipated Timeline and Schedule Milestones

July 1, 2020 is the ideal start date as we have many entities expressing interest in utilizing C-PACE for upcoming projects. If it is unadvisable to move this quickly through the process, please explain this in your proposal and provide an alternate timeline.

Issuance of RFP	November 26, 2019
Proposals due	On or before December 23, 2019
Selection and Contracting of Consultant	On or before January 10, 2020
Oklahoma County Replicable C-PACE Guidance, Program Criteria and Forms, and Administration Complete	On or before July 1, 2020
C-PACE active in Tulsa County	On or before July 1, 2020

V. Proposal Requirements

Please include the following information:

1. Qualifications, experience and background of firm, identified members of consulting team, and organizational staff. Include recent relevant projects, consultant roles and extent of subcontractor use.
2. Work Plan and Timeline – Description of tasks, final products, and timelines including milestones and resource requirements
3. Proposed work plan for executing any deliverable recommendations not identified in this RFP.
4. Proposed budget itemized by project deliverables (as applicable), fixed and non-fixed costs. Please include travel.

VI. Selection Criteria

Proposals will be evaluated and ranked based on the following:

1. Demonstrated understanding of project and work plan (10 points)
2. Project schedule and timeline (10 points)
3. Experience with similar projects (10 points)
4. Desired and value-added capabilities (10 points)
5. Clear identification and cost-justification detail of budget (10 points)

VII. Additional Information

Proposals will be evaluated by INCOG and the Oklahoma C-PACE Steering Committee. Proposals will be reviewed in terms of content, completeness, experience of the consultant(s), ability to meet scope of services, and budget. Previous client references may be contacted to verify client satisfaction, including clients not listed on the proposal. Qualified consultants may be selected for follow-up interviews and if requested, may take place at through remote conferencing technology or at the INCOG offices. It is anticipated that a contract will be negotiated with the selected firm. INCOG reserves the right to waive any formality and any technicalities, or to cancel in part or in its entirety this RFP. This solicitation of proposals in no way obligates INCOG to award a contract.

If you have questions, you may submit them in writing to ajaynes@incog.org. All questions and answers will be added to a list of Frequently Asked Questions and posted to www.incog.org/cpace within two business days of receipt.

VIII. Optional Pre-Proposal Conference Call:

An optional Pre-Proposal Conference Call will be held Friday, December 06, 2019 at 10:00am CST to discuss the RFP and submission process. Call-in (515) 604-9022 access code 923466. A list of questions and answers will be posted to www.incog.org/cpace within two business days of the call.

IX. Instructions for submitting proposals:

Proposals are due to INCOG by 5:00 p.m. CST on Monday, December 23, 2019. Electronic submissions are required. Please email to ajaynes@incog.org. If you would like to also submit a hard copy, please send one hard copy to Adriane Jaynes, INCOG, 2 West 2nd Street, Suite 800, Tulsa, Oklahoma 74103.

INCOG reserves the sole right to evaluate the submittal, waive any irregularities therein, select candidates or reject any and all firms that submitted should it be deemed for its best interest. Parties selected will be notified by e-mail. Please direct comments, questions, and any request for information to Adriane Jaynes, INCOG Energy Programs Coordinator, at 918.579.2494 or ajaynes@incog.org.