Administration of Project: Local Higher Education

Project Name: CSU Downtown Cleveland Microgrid
Response Deadline: 02/28/2020 2:00 pm local time

Project Location: 2121 Euclid Avenue
Project Number: LF-2020-A

City / County: Cleveland / Cuyahoga
Project Manager: Dwayne Wilson

Owner: Cleveland State University
Contracting Authority: Local Higher Education

Delivery Method: N/A
Prevailing Wages: None

No. of paper copies requested (stapled, not bound): 6
No. of electronic copies requested (PDF): 1

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Dwayne Wilson at 1802 E. 25th Street, Rm 221, Cleveland, Ohio 44114 See Section H of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Dwayne Wilson at d.d.wilson17@csuohio.edu with the project number included in the subject line (no phone calls please). Questions will be answered and posted to the Opportunities page on the OFCC website at http://ofcc.ohio.gov on a regular basis until one week before the response deadline. The name of the party submitting a question will not be included on the Q&A document.

Project Overview

A. Project Description

Cleveland State University (CSU) is interested in potentially participating, as an end user, in a microgrid that has been proposed for Downtown Cleveland. The Downtown Cleveland Microgrid project is a joint initiative by the Cleveland Foundation, Cuyahoga County and the City of Cleveland (Microgrid Team). These three organizations have entered into a Memorandum of Understanding pursuant to which they issued an RFQ to potential microgrid developers in October 2019. An RFP is expected to be issued in February 2020. The goal of the RFQ/RFP process is to identify a developer/operator who would enter into an agreement with Cleveland Public Power. Because the microgrid’s success will likely be tied to end user commitments, CSU has been invited to participate in the process by entertaining proposals from finalists to the RFP for its campus energy supply.

The RFQ issued by the Microgrid Team received eleven responses. Eight of these respondents will be invited to submit in response to the upcoming RFP. The decision to issue the RFQ was based upon a feasibility study undertaken jointly by CSU, CWRU, Cuyahoga County and the City of Cleveland, and funded by the Cleveland Foundation (Research Group).

The Microgrid Team RFP is expected to be issued in two parts: an RFP-Indicative stage followed by an RFP-Final stage. The RFPI will seek ideas and indicative prices. Responses thereto will be used to select two or three finalists, which then will be invited to respond to the RFPF. If CSU is included in any of the finalist’s proposals, the university may have an opportunity to participate in the final selection process. Middough Engineering is leading the RFQ/P process.

The Research Group published three studies: (1) Techno-Economic Analysis of a Microgrid in Downtown Cleveland, (2) Understanding the Value of Resiliency, and (3) Analysis of the Market for Resilient Power and the Economic Impact of the Development of a Microgrid in Downtown Cleveland. The first two of these studies may have relevance to CSU’s evaluation of a microgrid proposal. These can be found at:

- https://engagedscholarship.csuohio.edu/urban_facpub/1559/
- https://engagedscholarship.csuohio.edu/urban_facpub/1516/

CSU will require techno-economic studies and advice from an engineering team in developing a strategy to receive and evaluate proposals from RFP respondents and from Cleveland Public Power. The scope of the work required is set forth below.

B. Scope of Services

The Scope of Services shall be set forth in three phases. The first shall consist of an initial investigation, in which the consultant will identify basic parameters for CSU’s current and projected energy use, and will develop strategies for understanding the value proposed to CSU by the Downtown Cleveland Microgrid. The first phase also includes projecting likely costs for near and intermediate term assuming the status quo and industry accepted projections for commodity
prices. The second phase implements the strategy developed in the first phase. It includes helping CSU evaluate proposals from RFP final respondents. The final phase includes supporting CSU during negotiations of terms and conditions with the RFP winner and with Cleveland Public Power, should CSU decide to pursue a contract to receive services from the Downtown Cleveland Microgrid.

**Phase 1. Initial Investigation (Estimated March-April 2020).**
- Review Microgrid Techno-Economic Feasibility Study undertaken by CSU/CWRU/Cuyahoga County/City of Cleveland.
- Review CSU campus demand for electricity, natural gas, steam and chilled water.
- Review CSU maps and infrastructure to determine if CSU facilities are suited for participation in the microgrid.
- Review CSU back up power systems, demand for enhanced uptime.
- Project energy costs for CSU assuming the status quo.
- Define and undertake investigation needed to evaluate technical and economic feasibility of joining microgrid.
- Evaluate requirements for possible change from existing electrical distribution utility.
- Evaluate the economics of alternatives to joining the community microgrid, including the status quo, on-site Combined Heat and Power systems and/or CSU-only microgrid.
- Participate in phone conferences and attend meetings with CSU Facilities as may be required.
- Attend meetings with Cleveland Public Power, Cuyahoga County and/or the Cleveland Foundation as may be necessary to develop a strategy for evaluating the CSU microgrid.
- Attend meetings with RFP respondents, help CSU answer questions as may be required.
- Deliver report outlining planned investigation, strategy for evaluating CSU microgrid participation.

**Phase 2. Evaluate Proposals from RFP Finalists (Estimated May-June 2020).**
- Help CSU implement strategy for evaluating microgrid proposals.
- Review and help CSU evaluate responses from RFP finalists, including economic impact to CSU
- Interact with Cleveland Public Power, Cuyahoga County and/or the Cleveland Foundation as may be necessary to help CSU evaluate final proposals.
- Analyze any district energy components, such as hot or chilled water systems, proposed by RFP finalists.
- Meet with CSU Facilities team as needed to deliberate on microgrid strategy, evaluate proposals.

**Phase 3. Support CSU Negotiations for Agreement with CPP, Microgrid Operator (2020).**
- Meet with CSU facilities management as to evaluate proposal from RFP respondent selected by CPP, Cuyahoga County and Cleveland Foundation, including possible district energy proposals. Evaluation shall include:
  - Comparison of likely all-in electricity costs to continuing with the status quo.
  - Analysis of effects proposal would likely have on capacity or demand charges.
  - Analysis of effects proposal would likely have on costs of maintaining back up power on campus.
  - Analysis of ability to monetize existing assets, such as back up generation, or to participate in demand response programs.
  - Analysis of likely district energy costs, if applicable, compared to continuing with the status quo.
  - Analysis of likely carbon emission profile compared to status quo.
  - Analysis of campus downtime to switch to the microgrid and how this will affect University operations.
- Meet with CSU facilities management as needed to evaluate proposal from CPP.
- Ongoing support in evaluating negotiated changes to the proposal from the RFP finalist and/or CPP.

Second and Third phases of the project will be triggered only upon written notice from the University. The University reserves the right to terminate the consulting services at any phase of the process.

**Pursuant to ORC 153.694, professional design firms selected to provide C-A/E services shall not provide any A/E of Record services for the project for which the professional design firm was selected as the C-A/E.**

For projects advertised with an appropriately developed Program of Requirements (“POR”), upon award of the Agreement, commence with Design. For projects without such a POR, upon award of the Agreement, commence by developing the Program of Requirements.

The selected Criteria Architect/Engineer (“C-A/E”), as a portion of its required Scope of Services and prior to submitting its proposals, will discuss and clarify with the Owner and/or Contracting Authority, the cost breakdown of the Architect/Engineer Agreement detailed cost components to address the Owner’s project requirements. Participate in the Encouraging Growth, Diversity & Equity (“EDGE”) Program as required by statute and the Agreement.

As required by the Agreement, and as properly authorized, provide the following categories of services: Concept and Design Criteria, Best Value Selection, Preconstruction, Construction and Closeout, and Additional Services of all types including Schematic Design and Design Development if a Design-Build is not engaged to perform these services.
Request for Qualifications (Criteria Architect / Engineer)
State of Ohio Standard Forms and Documents

Refer to the Ohio Facilities Construction Manual for additional information about the type and extent of services required for each. A copy of the standard Agreement can be obtained at the OFCC website at http://ofcc.ohio.gov.

For purposes of completing the Relevant Project Experience Matrix in Section F of the Statement of Qualifications (Form F110-330), below is a list of relevant scope of work requirements for this RFQ:

1. Industrial grade utilities and infrastructure.
2. Knowledge of district energy utilities, including electricity, steam, hot water, chilled water and natural gas.
3. On-site generation, including combined heat and power.
4. Electricity markets, regulation and Ohio electricity policy.
5. Municipal and investor-owned electric distribution companies.

C. Funding / Estimated Budget

<table>
<thead>
<tr>
<th>Total Project Cost</th>
<th>State Funding</th>
<th>Construction Cost</th>
<th>Other Funding</th>
<th>Estimated A/E Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>$TBD</td>
<td>$</td>
<td>$N/A</td>
<td>$TBD</td>
<td>TBD% to TBD%</td>
</tr>
</tbody>
</table>

NOTE: The C-A/E fee for this project includes all professional design services, and consultant services necessary for proper completion of the C-A/E Basic Services for the successful completion of the project, including but not limited to: preparation / review and verification of the Program of Requirements, validation of existing site conditions (but not subsurface or hidden conditions), preparation of cost estimates and design schedules for the project. Fees may be negotiated and allocated for Additional Services (e.g., creation of a Program of Requirements, extensive evaluation or validation of site conditions, extensive pre-design investigations, code-required special inspection and testing, Quality Assurance testing during the construction period, and testing due to unforeseen conditions).

D. Services Required (see note below)

Primary: Electrical Engineering
Secondary: Energy Planning
- Systems Engineering
- Mechanical Engineering
- Plumbing Engineering

E. Anticipated Schedule

<table>
<thead>
<tr>
<th>Service Completed</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Services Start</td>
<td>03 / 20</td>
</tr>
<tr>
<td>Construction Notice to Proceed</td>
<td>N/A / 20</td>
</tr>
<tr>
<td>Substantial Completion of all Work</td>
<td>N/A / 20</td>
</tr>
<tr>
<td>Professional Services Completed</td>
<td>01 / 21</td>
</tr>
</tbody>
</table>

F. EDGE Participation Goal

| Percent of initial TOTAL C-A/E Fee | 5.0% |

NOTE: The primary C-A/E shall be (1) a registered architect holding a license and certificate of authorization issued by the Ohio Architects Board pursuant to ORC Chapter 4703, (2) a landscape architect holding a license and certificate of authorization issued by the Ohio Landscape Architects Board pursuant to ORC Chapter 4703, or (3) a professional engineer or professional surveyor holding a license and certificate of authorization issued by the Ohio Engineers and Surveyors Board pursuant to ORC Chapter 4733.

G. Evaluation Criteria for Selection

- Industrial grade utilities and infrastructure and extensive knowledge of district energy utilities, including electricity, steam, hot water, chilled water and natural gas.
- On-site generation, including combined heat and power.
- Energy planning, strategy and management for large organizations.
- Electricity markets, regulation and Ohio electricity policy.
- Municipal and investor-owned electric distribution companies.
- Previous experience compatible with the proposed project (e.g., type, size).
- Relevant past work of prospective firm’s proposed consultants.
- Past performance of prospective firm and its proposed consultants.
- Qualifications and experience of individuals directly involved with the project.
- Proximity of prospective firms to the project site.
- Proposer’s apparent resources and capacity to meet the needs of this project.
- The selected C-A/E and all its consultants must have the capability to use the Internet within their normal business location(s) during normal business hours.
- Ability to provide independent, unbiased analysis. All team members should have no direct interest in the success or outcome of the Downtown Cleveland Microgrid project.
Interested C-A/E firms are required to submit the Commitment to Participate in the EDGE Business Assistance Program form in its Statement of Qualifications (Form F110-330) submitted in response to the RFQ, to indicate its intent to contract with and use EDGE-certified Business Enterprise(s), as a part of the C-A/E’s team. The Intent to Contract and to Perform and / or waiver request letter and Demonstration of Good Faith Effort form(s) with complete documentation must be attached to the C-A/E’s Technical Proposal. Both forms can be accessed via the OFCC website at http://ofcc.ohio.gov. The Intent to Contract and to Perform form is again required at the Fee Proposal stage.

For all Statements of Qualifications, please identify the EDGE-certified Business Enterprises, by name, which will participate in the delivery of the proposed professional services solicited in the RFQ.

H. Submittal Instructions

Firms are required to submit the current version of Statement of Qualifications (Form F110-330) available via the OFCC website at http://ofcc.ohio.gov.

Electronic submittals should be combined into one PDF file named with the project number listed on the RFQ and your firm’s name. Use the “print” feature of Adobe Acrobat or similar software for creating a PDF rather than using a scanner. If possible, please reduce the file size of the PDF. In Acrobat, go to Advanced, then PDF Optimizer. Also, please label the CD or DVD and the sleeve with the project number and firm name if applicable.

Paper copies of the Statement of Qualifications, if requested, should be stapled only. Do not use special bindings or coverings of any type. Cover letters and transmittals are not necessary.

Facsimile copies of the Statement of Qualifications will not be accepted.

Firms are requested to identify professional registrations, memberships and credentials including: LEED GA, LEED AP, LEED AP+, CCCA, CCM, CCS, CDT, CPE, DBIA, and any other appropriate design and construction industry credentials. Identify that information on the resume page for individual in Block 22, Section E of the F110-330 form.
## Criteria Architect/Engineer Selection Rating Form

### State of Ohio Standard Forms and Documents

**Project Name:** CSU Downtown Cleveland Microgrid  
**Proposer Firm:**  
**Project Number:** LF-2020-A  
**City, State, Zip:**  

### Selection Criteria

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>Value</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Primary Firm Location, Workload and Size</strong> (Maximum 10 points)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Proximity of firm to project site</td>
<td>Less than 50 miles</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>50 miles to 100 miles</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>More than 100 miles</td>
<td>0</td>
</tr>
<tr>
<td>b. Amount of fees awarded by Contracting Authority in previous 24 months</td>
<td>Less than $50,000</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>$50,000 to $100,000</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>More than $100,000</td>
<td>0</td>
</tr>
<tr>
<td>c. Number of licensed professionals</td>
<td>Less than 5 professionals</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>5 to 10 professionals</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>More than 20 professionals</td>
<td>2</td>
</tr>
<tr>
<td><strong>2. Primary Qualifications</strong> (Maximum 30 points)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Project management lead</td>
<td>Experience / ability of project manager to manage scope / budget / schedule / quality</td>
<td>0 - 10</td>
</tr>
<tr>
<td>b. Project criteria design lead</td>
<td>Experience / creativity of criteria designer to document owner’s vision and requirements</td>
<td>0 - 10</td>
</tr>
<tr>
<td>c. Technical staff</td>
<td>Experience / ability of technical staff to create accurate and complete design criteria</td>
<td>0 - 10</td>
</tr>
<tr>
<td><strong>3. Key Consultant Qualifications</strong> (Maximum 20 points)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Key discipline leads</td>
<td>Experience / ability of key consultants to perform effectively and collaboratively</td>
<td>0 - 15</td>
</tr>
<tr>
<td>b. Proposed EDGE-certified Consultant participation*</td>
<td>One point for every 2 percent increase in professional services over the EDGE participation goal</td>
<td>0 - 5</td>
</tr>
<tr>
<td><strong>4. Overall Team Qualifications</strong> (Maximum 10 points)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Previous team collaboration</td>
<td>Less than 2 sample projects</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>2 to 4 sample projects</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>More than 4 sample projects</td>
<td>5</td>
</tr>
<tr>
<td>b. Team organization</td>
<td>Clarity of responsibility / communication demonstrated by table of organization</td>
<td>0 - 5</td>
</tr>
<tr>
<td><strong>5. Overall Team Experience</strong> (Maximum 30 points)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Previous team performance</td>
<td>Past performance as indicated by evaluations and letters of reference</td>
<td>0 - 10</td>
</tr>
<tr>
<td>b. Experience with similar projects / delivery methods</td>
<td>Less than 2 projects</td>
<td>0 - 3</td>
</tr>
<tr>
<td></td>
<td>2 to 6 projects</td>
<td>4 - 6</td>
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<tr>
<td></td>
<td>More than 6 projects</td>
<td>7 - 10</td>
</tr>
<tr>
<td>c. Budget and schedule management</td>
<td>Performance in completing projects within original construction budget and schedule</td>
<td>0 - 5</td>
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<tr>
<td>d. Knowledge of Ohio Capital Improvements process</td>
<td>Less than 2 projects</td>
<td>0 - 1</td>
</tr>
<tr>
<td></td>
<td>2 to 4 projects</td>
<td>2 - 3</td>
</tr>
<tr>
<td></td>
<td>More than 6 projects</td>
<td>4 - 5</td>
</tr>
</tbody>
</table>

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm

### Subtotal

### Notes:

### Evaluator:

**Name:**

**Signature:**

**Date:**