



**Christopher J. Gagliastro, MCPPO**  
**Purchasing Agent**

**RFP NO. 8146-W4**  
**ISSUANCE DATE: 2/23/24**

**BUYER: Christopher J. Gagliastro, MCPPO**

**AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER  
REQUEST FOR PROPOSALS  
NOTICE TO PROPOSERS**

**RFP TITLE: Consultant – Water-Sewer Rate Study / DPWP**

***REFER TO PAGE 7 FOR PROPOSAL SUBMISSION INFORMATION***

**General Conditions:**

All proposals are subject to the terms, conditions and specifications herein set forth:

1. **Scope: Provide professional consulting services to examine & analyze the City's water-sewer rate system & structure per the attached requirements and specifications City of Worcester Department of Public Works & Parks.**
2. A certified check or bid bond made payable to the "City Treasurer, City of Worcester" in the amount of N/A must accompany this proposal. This must be submitted under separate sealed cover marked "Proposal Security." In the case of default, the surety shall be forfeited to the City as liquidated damages.
3. All terms and conditions are applicable to this proposal except the following section(s) which are hereby deleted from this RFP: 4, 22, 23, 27
4. A performance bond in the amount of not applicable will be required. If this proposal is accepted by the City and the Proposer shall fail to contract as set forth in these requirements and to give a bond in the aforementioned amount, within ten (10) days, (not including Sundays, Saturdays, or a legal Holiday) from the date of the mailing of a notice from the City to the Proposer, according to the address given herewith, that the contract is ready for signature, the City may by option determine that the proposer has abandoned the contract and thereupon the proposal and acceptance shall be null and void and the proposal security accompanying this proposal shall become the property of the City as liquidated damages. Performance bond shall be on the City's form only.

**Any prospective proposer requesting a change in or interpretation of existing specifications or terms and conditions must do so within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal opening date. All requests are to be in writing to the Purchasing Division. No changes will be considered nor will any interpretation issued unless request is in our hands within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal submission date.**

**Any inquiries related to technical or contractual matters must be submitted in writing to:**

**Christopher J. Gagliastro, MCPPO  
Purchasing Director  
City of Worcester, City Hall  
455 Main Street, Room 201  
Worcester, MA 01608  
[gagliastroc@worcesterma.gov](mailto:gagliastroc@worcesterma.gov)**

5. Nothing herein is intended to exclude any responsible Proposer or in any way restrain competition. All responsible Proposers are encouraged to submit proposals. The City encourages participation by Minority and Women Owned Business Enterprises (M/WBE).
6. The following meanings are attached to the defined words when used in this RFP.
  - a) The word "City" means The City of Worcester, Massachusetts.
  - b) The word "Proposer" or "Respondent" means the person, firm or corporation submitting proposal on these specifications or any part thereof.
  - c) The word "Contractor" means the person, firm or corporation with whom the contract is made by carrying out the provisions of these specifications and the contract.
  - d) The words "Firm Price" shall mean a guarantee against price increase during the life of the contract.
7. All proposals and other documents relating to this RFP are subject to the public records provisions of M.G.L. c.30B and shall remain confidential until the time specified in c.30B section 6 (d).
8. All material submitted by vendors becomes the property of the City. The City is under no obligations to return any of the material submitted by a vendor in response to this RFP.
9. Each vendor's proposal must remain in effect for at least 120 days from the deadline for its submission. The City will decide upon acceptance within 120 days of submission.
10. It is understood and agreed that it shall be a material breach of any contract resulting from this RFP for the Contractor to engage in any practice which shall violate any provision of Massachusetts General Laws, Chapter 151B, relative to discrimination in hiring, discharge, compensation, or terms, conditions or privileges of employment because of race, color,

religious creed, national origin, sex, age or ancestry.

11. The City reserves the right to accept or reject any or all proposals submitted and waive informalities and technicalities.
12. The City will review and analyze each proposal and reserve the right to interview selected proposers. The City shall select the proposer, which in the City's opinion, has made the proposal best suited to the needs and goals of the City and its operations and deemed to be in compliance with the terms of this RFP.
13. The Contractor will be required to indemnify and save harmless the City of Worcester for all damages to life and property that may occur due to his or her negligence or that of his or her employees, subcontractors, etc. during the contract derived from this RFP.
14. The Contract Agreement will be drafted by the City's Law Department in compliance with the terms of the RFP and may incorporate the terms of this RFP and of the proposal selected.
15. The Proposer must certify that no official or employee of the City of Worcester, Massachusetts, is pecuniarily interested in this proposal or in the contract which the proposer offers to execute or in expected profits to arise therefrom, unless there has been compliance with the provisions of G.L.C. 43 section 27, and that this proposal is made in good faith without fraud or collusion or connection with any other person submitting a proposal.
16. Any proposal withdrawn after time and date specified, the proposer shall forfeit deposit on proposal as liquidated damages.
17. A vendor conference will be held as follows:     n / a
18. The Contractor shall not assign, transfer, sublet, convey or otherwise dispose of any contract which results from this RFP, or its right, title or interest therein or its power to execute the same to any other person, firm, partnership, company or corporation without the previous consent in writing of the City. Should the Contractor attempt any of the above without the written consent of the City, the City reserves the right to declare the Contractor in default and terminate the contract for cause.
19. The Contractor shall obtain and maintain in force at all times during the term of the contract derived from this RFP, insurance coverage pertaining to Public Liability, Property Damage and Worker's Compensation as outlined in Section IV. INSURANCE REQUIREMENTS of this RFP.
20. The Contractor shall carry Public Liability Insurance with an insurance company satisfactory to the City so as to save the City harmless from any and all claims for damages arising out of bodily injury to or death of any person or persons, and for all claims for damages arising out of injury to or destruction of property caused by accident resulting from the use of implements, equipment or labor used in the performance of the contract or from any neglect, default or omission, or want of proper care, or misconduct on the part of the Contractor or for anyone in his or her employ during the execution of the contract derived from this RFP.
21. Prior to starting on the contract derived from this RFP, the Contractor shall deposit with the Purchasing Division, certificate from the insurer to the effect that the insurance policies

required in the above paragraph have been issued to the Contractor. The certificates must be on a form satisfactory to the City.

22. All prices quoted must include inside delivery, and set-up in place F.O.B. destination to pre-designated City of Worcester departments.
23. No special charges will be allowed for rigging, packing, crating, freight, express, or carriage unless specifically stated and included in the vendor's proposal.
24. The award to the successful proposer may be cancelled in the event of vendor nonperformance as may be determined by the City.
25. The successful proposer shall comply with all applicable federal, state and local laws, ordinances, and regulations. The awarded contract shall be governed under the laws of the Commonwealth of Massachusetts.
26. Purchases made by the City are exempt from Federal and Massachusetts state taxes and proposal prices must exclude any such taxes. Tax exemption certificates will be furnished upon request.
27. When the contract is executed, a performance bond, in the full amount of the contract, is required. See paragraph 4. The bond will be of a surety company qualified to do business under the laws of the Commonwealth of Massachusetts. The cost of this bond is the vendor's responsibility. Bonds shall remain in force and effect thru the performance of the contract.
28. Expenditures by the City and authorization to spend for particular purposes are made on fiscal year basis. The City's fiscal year is the twelve-month period ending June 30 of each year. The obligations of the City under any agreement to be reached are subject to the appropriation or authorization of the necessary funds. The City agrees to make reasonable efforts to obtain funding and all necessary authorization.
29. No amendment to the contract shall be effective unless it is in writing and signed by authorized representatives of both parties and is accepted by the City of Worcester.
30. The vendor (and its insurers, if any) shall bear all risk of loss or damage to the equipment which occurs in transit to the user site. The risk of loss or damage to purchased equipment shall remain with the vendor until the purchase price has been paid and title has passed. The vendor shall also bear the risk of loss or damage to leased or rented equipment during the City of Worcester's possession and use thereof subject, however to such conditions and limitations as may be stated elsewhere in the contract.
31. The vendor shall not assign or in any way transfer any interest in the contract without the prior written consent of the City provided, however, that claims for money due or to become due to vendor from the City may be assigned to a bank, trust company, or other financial institution without such consent so long as notice of such assignment is furnished promptly to the City. Any such assignment shall be expressly made subject to all defenses, setoffs, or counterclaims which would have been available to the City against the vendor in the absence of such assignment.
32. None of the services to be provided by the vendor pursuant to the contract shall be

subcontracted or delegated to any other organization, association, individual, corporation, partnership or other such entity without the prior written consent of the City. No subcontract or delegation shall relieve or discharge the vendor from any obligation or liability under the contract except as specifically set forth in the instrument of consent. Any subcontract to which the City has consented shall be attached to the original of the contract on file in the City of Worcester.

33. Neither party will be liable to the other or be deemed to be in breach of the contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include but are not limited to, acts of God or the public enemy, fires, floods, epidemics, quarantine restrictions, strikes, freight, embargoes, and unusually severe weather. If the vendor's failure to perform is caused by the default of the subcontractor, and if such default arises out of causes beyond the reasonable control of both the vendor and the subcontractor, and without the fault or negligence of either of them, the vendor shall not be liable for any excess costs for failure to perform, unless the equipment or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the vendor to meet the required delivery schedule. Dates or times of performance will be extended to the extent of delays excused in this section, provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay.
34. The vendor shall provide to the City of Worcester a warranty and a commitment which clearly states that all equipment and services proposed and supplied by the Vendor, and/or its subcontractors, performs as expected and promised by the Vendor.
35. The vendor represents that no person other than bona fide employees working solely for the vendor, have been employed or retained to solicit or secure this agreement upon an arrangement or understanding for a commission, percentage, brokerage fee, gift or any other consideration contingent upon the award or making of this contract. For breach or violation of the representation, the City shall have the right to annul the contract without liability, or in its discretion to deduct from the contract price or consideration, or otherwise recover the full amount of such commission, percentage, brokerage fee or other consideration.
36. Any contract made by the City in which the Purchasing Agent or any employee of his/her department, the heads of using agencies or any other officer or employee of the City having a part in the placing of such contract is financially interested, directly or indirectly, shall be void.
37. The vendor shall not discriminate against any qualified employee or applicant for employment because of race, color, national origin, ancestry, age, sex, religion or medical handicap. The vendor agrees to comply with all applicable Federal and State Statutes, rules and regulations prohibiting discrimination in employment including: Title VII of the Civil Rights Acts of 1964; The Age Discrimination in Employment Act of 1967; Section 504 of the Rehabilitation Act of 1973; Massachusetts General Laws Chapter 151B, Section 4 (1) and all relevant administrative orders and executive orders.

If a complaint or claim alleging violation by the vendor of such statutes, rules or regulations is presented to the Massachusetts Commission Against

Discrimination (MCAD), the vendor agrees to cooperate with MCAD in the investigation and disposition of such complaint or claim.

In the event of vendor noncompliance with the provisions of this section, the City shall impose such sanctions as it deems appropriate, including but limited to:

- 1) Withholding of payments due vendor under the contract until vendor complies.
- 2) Termination or suspension of the contract.

## **SUBMISSION OF PROPOSALS**

38. Proposals must be submitted in two (2) packages according to the instructions below. The City intends to consider responses in the Technical Proposal evaluation requirements before considering costs. *Therefore, no reference to pricing may be made in the Technical Proposal.*

A sealed package containing **the original, 3 copies, plus 1 PDF copy on USB drive** of the proposal **must** be labeled as follows:

**Purchasing Agent, City of Worcester**

**Consultant – Water-Sewer Rate Study / DPWP – Technical Proposal**

**455 Main Street, Room 201  
Worcester, MA 01608**

**Re: RFP No. 8146-W4**

A sealed package containing **the original copy** of the proposal **must** be labeled as follows:

**Purchasing Agent, City of Worcester**

**Consultant – Water-Sewer Rate Study / DPWP – Price Proposal**

**455 Main Street, Room 201  
Worcester, MA 01608**

**Re: RFP No. 8146-W4**

***PRICE PROPOSAL PAGE IS LOCATED AT END OF SPECIFICATIONS***

**Proposals must be delivered no later than Wednesday, March 20, 2024 at 10:00 AM LOCAL TIME. *Late submissions will be rejected, regardless of circumstances.*** The City is not responsible for submittals not properly marked.

The evaluation and cost proposals will remain confidential until a formal and finalized contract has been executed.

## **RFP EVALUATION**

39. The City of Worcester Purchasing Agent will assign an evaluation team, hereafter referred to as the Selection Committee, to perform a full and complete evaluation of RFP submittals. The Purchasing Agent will ultimately forward a formal recommendation of award to the City Manager who has final award authority.
40. RFP evaluation responses will be evaluated by the Selection Committee based directly upon vendor's response to mandatory and comparative evaluation criteria. Vendors must meet or exceed the mandatory criteria requirements or be rejected as non-responsive.

Comparative criteria will be evaluated by use of four (4) rating categories as set forth by M.G.L. Chapter 30B:

- 1) HIGHLY ADVANTAGEOUS - Vendor's submittal meets all the stated requirements and offers significant performance above the stated requirements.
- 2) ADVANTAGEOUS - Vendor's submittal meets the stated requirements without risk or disadvantage.
- 3) NOT ADVANTAGEOUS - Vendor's submittal contains some risk or disadvantage but is not unacceptable.
- 4) UNACCEPTABLE - Vendor's submittal fails to meet the standards of the stated requirements.

After proposals have been assigned ratings on the basis of each evaluation criterion, a composite rating will be established by the Selection Committee. Submittals will then be ranked based upon finalized composite rating.

41. The Purchasing Agent will identify the most advantageous proposal based upon the rankings of the Selection Committee and an evaluation of the price proposals received. The Purchasing Agent will forward a recommendation for award to the City Manager based upon the most advantageous proposal received considering evaluation rankings and price proposals received.



GIVE FULL NAMES AND RESIDENCES OF ALL PERSONS INTERESTED IN THE FOREGOING PROPOSAL.

(NOTICE: Give first and last name in full; in case of corporations, give corporate name and names of President, Treasurer, and Manager; and in case of firms give names of the individual members)

Name	Address	Zip Code
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_____	_____	_____
_____	_____	_____
_____	_____	_____

KINDLY FURNISH THE FOLLOWING INFORMATION REGARDING BIDDER:

(1)	If an Individual or Proprietorship
Name of Owner:	_____
Business Address:	_____
Zip Code	_____ Telephone No. _____
Email	_____
Home Address	_____
Zip Code	_____ Telephone No. _____

(2)	If a Partnership, Full names and addresses of all partners	
<u>Name</u>	<u>Address</u>	<u>Zip Code</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
Business Address	_____ Zip Code	_____
	Tel. No.	_____

(3) If a Corporation

Full Legal Name: \_\_\_\_\_

State of Incorporation: \_\_\_\_\_ Qualified in Massachusetts? Yes \_\_\_\_\_ No \_\_\_\_\_

Principal Place of Business \_\_\_\_\_  
Street P.O. Box

City/Town State Zip

Email: \_\_\_\_\_

Telephone No. \_\_\_\_\_

Place of Business in Massachusetts \_\_\_\_\_  
Street P.O. Box

City/Town State Zip

Telephone No. \_\_\_\_\_

GIVE THE FOLLOWING INFORMATION REGARDING SURETY COMPANY

Full Legal Name of Surety Company \_\_\_\_\_

State of Incorporation \_\_\_\_\_ Admitted in Massachusetts? Yes \_\_\_\_\_ No \_\_\_\_\_

Principal Place of Business \_\_\_\_\_  
Street P.O. Box

City/Town State Zip

Place of Business in Massachusetts \_\_\_\_\_  
Street P.O. Box

City/Town State Zip

Telephone No. \_\_\_\_\_

NOTE:

The Office of the Attorney General, Washington, D.C. requires the following information on all bid proposals amounting to \$1,000.00 or more.

E.I. Number of bidder \_\_\_\_\_

This number is regularly used by companies when filing their "EMPLOYER'S FEDERAL TAX RETURN, U.S." Treasury Department Form 941.

AUTHORIZED SIGNATURE OF BIDDER \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

UNDER MASSACHUSETTS GENERAL LAWS, CHAPTER 30B: SECTION 10, THE FOLLOWING CERTIFICATION MUST BE PROVIDED:

Section 10. A person submitting a bid or a proposal for the procurement or disposal of supplies, or services to any governmental body shall certify in writing, on the bid or proposal, as follows:

"The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals."

(Please Print)

\_\_\_\_\_  
Name of Person Signing Bid

\_\_\_\_\_  
Signature of Person Signing Bid

\_\_\_\_\_  
Company

No award will be made without vendor certification of the above.

- **Proposers must sign and submit the above form with their proposal submission.**

## **CERTIFICATE OF AUTHORITY**

At a duly authorized meeting of the Board of Directors of the \_\_\_\_\_  
held on \_\_\_\_\_ Directors were present or waived notice,  
(name of corporation) (date)

it was voted that \_\_\_\_\_ of this company be and hereby is  
(officer and title)

authorized to execute contracts and bonds in the name and behalf of said company, and affix its Corporate Seal thereto, and such execution of any contract or bond of obligation in this company's name shall be valid and binding upon this company.

A TRUE COPY, ATTEST:

\_\_\_\_\_  
[Signed]

\_\_\_\_\_  
[Company Name and Address]

I hereby certify that I am the \_\_\_\_\_ of the \_\_\_\_\_  
(Title) (Name of Corporation)

that \_\_\_\_\_ is the duly elected \_\_\_\_\_  
(Name of Officer) (Title)

of said company, and the above vote has not been amended or rescinded and remains in full force and effect as of the date of this contract.

Signature: \_\_\_\_\_

Name/Title: \_\_\_\_\_

Date: \_\_\_\_\_

(Corporate Seal)

COMMONWEALTH OF MASSACHUSETTS

WORCESTER, SS.

On this \_\_\_\_ day of \_\_\_\_\_, 2024, before me the undersigned notary public, personally appeared \_\_\_\_\_, who proved to me through satisfactory evidence of identification, which was/were \_\_\_\_\_, to be the person whose name is signed on the preceding or attached document, and acknowledged to me he/she signed it voluntarily for its stated purpose.

\_\_\_\_\_  
Notary Public

My commission expires:

## **CONSULTANT – Worcester Water - Sewer Rate Study / DPWP**

**RFP #: 8146-W4**

### **OVERVIEW**

The City of Worcester is soliciting competitive sealed proposals (offers) for professional consulting services to examine, analyze the City's water and sewer cost of service and current rate structure and recommend changes to improve long term sustainability of the Water and Sewer Enterprise funds. The City of Worcester's water and sewer systems are described in detail in the attached section of the City's Integrated Water Resources Management Plan. That plan also identifies planned capital commitments anticipated in the coming ten years. Proposers may download copies of the plan here [Clean Worcester Waters | City of Worcester, MA \(worcesterma.gov\)](http://CleanWorcesterWaters.com)

This assessment must include, but not be limited to, a review of water and sewer budget and actual expenses for the prior 3 years, projected operational expenses, capital spending, debt service, reserve levels and revenue collections. It will result in a report including recommendations provided to the Commissioner of Public Works and Parks and presented publicly at a full City Council and/or subcommittee meeting. The consultant would be expected to provide this presentation and attend the public meeting to field questions.

### **SCOPE OF SERVICES**

The successful proposal will provide these services as outlined in the Scope of Services below:

- Identify and document all current revenues streams and rates for City of Worcester Water and Sewer enterprise funds.
- Evaluate the current rate and fee structure used by the City for various types of Water and Sewer accounts, including in-town, out of town, residential, commercial, irrigation, as well as fees charged.
- Compare rates and fee structure to other like systems in Massachusetts as well as national best practices.
- Identify and analyze all related costs—including personnel, operating, capital, debt service, indirect etc.--associated with the provision of water and sewer services. Develop a five-year forecast of the same.
- Evaluate all charges relative to cost allocations, allocated overhead, and other relevant factors.
- Develop and justify rate and user fee recommendations based on the costs of service for the next fiscal year and project rate increases for the subsequent five fiscal years.
- Project revenue impact of implementing the rate and fee recommendations for year one (1) and the subsequent five (5) years.
- Provide at least three proposals that illustrate the different impacts of different rate structure recommendations with respect to average bills, low income impact, reserve building, and debt service coverage or other priority areas.

- Provide a detailed report complete with all analytical materials, including spreadsheets and financial models.
- Provide and present a 15-30 minute presentation (Slide deck) summarizing the detailed report and field questions at a public meeting.

The Qualified respondent will demonstrate they have the resources, experience, expertise, and qualifications to provide consulting services of this kind. The Consultant should provide a list of references, identify the project team including resumes, examples of completed projects of a similar kind as well as more comprehensive information required to respond to the “Comparative Evaluation Criteria” listed below.

Finalists will be required to meet with a selection committee to review their proposal prior to final selection, and the project team should be available for questions during this proposal presentation to the City.

The Consultant will serve as project leader for the services they propose. Working with the City’s team, the Consultant will determine information needs and potential methods for gathering this information. Consultant should expect to attend regular weekly/bi-weekly, in-person or remote, meetings.

The Consultant’s completed rate study must be in professional, print-ready form, including detailed analysis and recommendations. The final study also includes a presentation document (slide deck presentation) and an oral presentation by the Consultant to be scheduled at a public meeting in the City of Worcester. The Consultant would be expected to be at the public meeting in person. The final report is anticipated to be submitted to the Committee in order to set a rate to be implemented on July 1, 2024..

### **Minimum / Mandatory Evaluation Criteria**

All proposals must satisfy all of the minimum criteria below for further evaluation. Proposals shall include information demonstrating compliance with each of these criteria. Proposals that do not meet the minimum criteria will not be further evaluated.

*Proposers must submit satisfactory response to each of the items A – H below in order to meet the minimum criteria. Please provide responses to each tab in proposal response.*

#### **A. Executive Summary:**

Provide an overall description of your firm including year established, size, location, personnel, qualifications, and why it is expertly qualified for this work, etc.

#### **B. Qualifications and Experience:**

Provide a detailed description of your firm's qualifications and experiences relative to the scope of work including, but not limited to, the following:

- a. 5 or more years' material involvement in working with water or sewer utilities in the development of Rate Studies and or cost of service analyses. Preference will be given to firms showing significant (5+ years) experience assisting multiple municipalities/utilities based on varying needs.
- b. Demonstrated expertise in the evaluation of water and/or sewer rates and development of rate studies
- c. Demonstrated experience presenting rate studies in a public setting
- d. Ability to complete projects on-time and on-budget. The City's goal is to have the final report on or about May 1, 2024.

#### **C. Examples of Previous Work:**

Respondents shall cite examples of previous work as above. Multiple examples are recommended, cross referencing the qualifications to the relevant sections. This requirement is important to our selection process.

#### **D. Project Team Qualifications:**

Respondents shall submit the qualifications and experience of the Project Lead and all members of the proposed project team including resumes for each member.

#### **E. Project Approach:**

Respondents shall submit their proposed approach and methodology for the project. How will the firm gather requirements, collect and analyze data, generate recommendations, and produce and present a final report.

**F. Proposed Services:**

- Provide an overview of the firm's understanding of the Scope of Services tasks to be provided
- Submit a proposed project work plan with timelines to accomplish all tasks listed in the Scope of Services.
- Submit associated costs or fee structure.

**G. Schedule**

**Respondent shall submit a proposed project schedule with target dates for milestones in the project including a final report submission date.**

**H. References**

Respondent must submit a minimum of five (5) references from rate study projects performed within the past five (5) years for local government or other water sewer utility organizations and include organization name, contact person, current phone number, email address and description of work performed.



## **Comparative Evaluation Criteria**

Each proposal meeting the Minimum Evaluation Criteria shall be further evaluated and rated according to the Comparative Evaluation Criteria in order to determine the relative merits of each proposal. The review will cover the criteria listed below. Within each category, the degree to which the proposal satisfies the stated criteria shall be reviewed and rated on a system of “Highly Advantageous,” “Advantageous,” and “Not Advantageous.”

**1) Professional Qualifications. Proposals should clearly demonstrate that the firm’s staff possesses the specific and direct qualifications and experience needed to carry out the scope of services.**

**Highly Advantageous-** Proposal demonstrates that the consultant team members have significant and demonstrated experience Utility Rate Studies including more than five (5) assessments for utilities with more than 10,000 customers.

**Advantageous-** Proposal demonstrates that the consultant team members have direct experience with Utility Rate Studies including more than five (5) assessments for Utilities with more than 5,000 customers.

**Not Advantageous-** Proposal demonstrates limited direct experience with Utility Rate Studies for utilities with more than 5,000 customers.

**2) Proposals should demonstrate project understanding as well as capacity and capability to meet the proposal requirements. Evidence of this should include a clear description of how the consultant would approach a project of this scope.**

**Highly Advantageous** - Proposal provides a clear and well thought out approach to meeting the project scope of services. The firm has demonstrated a thorough and detailed understanding of the project requirements and is providing staff and resources highly capable of meeting all the City’s requirements.

**Advantageous** - Proposal provides a thorough approach to implementing a project of this scope and. The firm has demonstrated a good understanding of the project and is providing staff and resources that can meet the City’s requirements.

**Not Advantageous** - Proposal provides an unclear approach to meeting the project scope of services and the firm has demonstrated a limited understanding of the project. Staff and resources may not be adequate in meeting the City’s requirements

**3) Proposals should clearly demonstrate that the firm's staff possesses the specific and direct qualifications and experience needed to carry out the scope of services.**

**Highly Advantageous** – The respondent team possesses superior qualifications demonstrated by ten (10) or more years of experience in successfully performing Utility Rate Studies as described in this RFP.

**Advantageous** – The respondent team possesses adequate qualifications demonstrated by five (5) to nine (9) years of experience in successfully performing Utility Rate Studies as described in this RFP.

**Not Advantageous** – The respondent team possesses the minimum of five (5) years of experience in successfully performing Utility Rate Studies as described in this RFP.

**4) Proposals should demonstrate past performance by including descriptions and examples of completed projects, letters of reference for specific Utility Rate Study projects and references with contact information.**

**Highly Advantageous** - Respondent demonstrates extensive experience and positive past performance in the management of Utility Rate Studies projects. References are included and support claims to high quality work. More than five examples are from different Utilities with varying needs, show attention to detail, clarity in writing and presentation.

**Advantageous** - Respondent demonstrates adequate experience and some positive past performance in the management of Utility Rate Studies. References are included and support claims to adequate work. Three to five examples are provided from other utilities, attention to detail, clarity in writing and presentation.

**Not Advantageous** - Respondent does not demonstrate sufficient experience or positive past performance in the management of Utility Rate Studies. References are included and do not support claims to work being completed. Examples show less than adequate attention to detail, clarity in writing and presentation.

**5) Proposer's prior rate studies demonstrate ability to provide options based on more than one industry standard or methodology.**

**Highly advantageous** – Five (5) or more prior rate studies include more than one industry standard or methodology.

**Advantageous** – Three to Five (3-5) prior rate studies include more than one industry standard or methodology.

**Not Advantageous**—Fewer than three (3) prior rate studies include more than one industry standard or methodology.

**6) Proposer provides a schedule that can meet the City’s timeline for rate development for a rate to be implemented July 1, 2024.**

**Highly advantageous** – Schedule shows report will be completed by May 1, 2024.

**Advantageous** – Schedule shows report will be completed by June 1, 2024

**Not Advantageous**—Schedule shows report will be completed after June 1, 2024

**References**

**7) Provide referenced from previous clients**

**Highly Advantageous** – The proposal includes ten (10) or more favorable references from previous Utility Rate Studies performed within the past five (5) years and includes company name, contact person, current phone number, email address and description of work performed.

**Advantageous** – The proposal includes six to nine (6 - 9) favorable references from previous Utility Rate Studies performed within the past five (5) years and includes company name, contact person, current phone number, email address and description of work performed.

**Not Advantageous** – The proposal includes the minimum of five (5) favorable references from Utility Rate Studies performed within the past five (5 years) and provide incomplete information regarding company name, contact person, current phone number, email address and description of work performed.

**8) Interview / Oral Presentation of Services**

**Highly Advantageous** – The respondent’s proposal presentation is supported by the individuals who will perform the services and include thorough, highly detailed information regarding how the firm will complete the scope of services. The proposal presentation included multiple (more than three) relatable examples and dialog from services performed for other similar municipalities or utilities.

**Advantageous** – The respondent’s proposal presentation is supported by some of the individuals who will perform the services and included adequately detailed information regarding how the firm will complete the scope of services. The proposal presentation included 3 or less relatable examples and dialog from services performed for other similar municipalities or utilities

**Not Advantageous** – The respondent’s presentation was conducted by the firm’s sales team and not the individuals who will perform the services. It includes some information regarding how the firm will complete the scope of services but was not clear as to the firm’s ability to comply with the stated scope of services. The proposal presentation included limited examples and dialog from services performed for other similar municipalities or utilities.

**COST / PRICE PROPOSAL****RFP #:** \_\_\_\_\_**(To be completed by proposer)**

*Fee for services must be submitted as a flat, lump sum fee for all tasks/deliverables/phases in the attached scope of services and required under the contract. Please include any and all costs associated in the lump sum fee. No additional fees will be considered. Proposers may not add additional items.*

Total Lump Sum Fee / Total Cost:    \$ \_\_\_\_\_ \*

**\*low proposal price based on this amount**

\_\_\_\_\_  
Signature of person submitting proposal

\_\_\_\_\_  
Date:

Printed

Name \_\_\_\_\_ Title \_\_\_\_\_

Company \_\_\_\_\_

Phone \_\_\_\_\_

E-Mail \_\_\_\_\_