

**THE SCHOOL DISTRICT OF PITTSBURGH**  
**(Pittsburgh, P.A.)**

**REQUEST FOR PROPOSALS**  
**FOR UTILITY INVOICE AUDITING SERVICES**

**Issuance Date: Monday, July 17, 2017**  
**Submission Date: Monday, August 7, 2017**

## Introduction

The purpose of this Request for Proposals (“RFP”) is to obtain utility invoice auditing services for the School District of Pittsburgh (the “School District”).

All proposals for underwriters shall be submitted to the School District as follows:

Thomas Meeder  
Chief of Plant Operations  
**The School District of Pittsburgh**  
#8 South 12<sup>TH</sup> Street  
Pittsburgh, PA 15203  
Tel: (412) 529-5120  
Fax: (412) 488-5124

One (1) original and five (3) copies of the proposal shall be prepared and submitted to the School District in such form as is set forth in this RFP by **12:00 p.m. on Monday, August 7, 2017.**

Proposals, including any/all attachments, cover letter and tabs should not exceed twenty (20) pages in length on 8 ½" X 11" paper, single spaced using a minimum font size of 10 pt.

Proposals should be submitted in accordance with the instructions detailed above and the following information detailed in the entire RFP. The School District reserves the right to select a proposal in its entirety or some portion(s) thereof.

Furthermore, the School District reserves the right to reject any and all proposals and to waive irregularities.

Proposals which are submitted in electronic format or faxed will not be accepted.

Any questions regarding this RFP should be addressed to Ted Lohner, Energy Management Coordinator at (412) 529-5129.

The School District intends to select one firm to utility invoice auditor for a term of **Three years starting December 1, 2017 thru November 30, 2020.**

The School District shall not bear any costs or obligation with regard to the preparation of a proposal. Any proposals submitted shall be honored for a period of no less than 60 days.

### **The Scope of work includes the following:**

- 1) The firm responding to this RFP shall have the capability to review and analyze on a monthly basis utility bills for the District and to serve as a consultant with respect to those bills, for the purpose and with the intent of determining whether the District has incurred or now is incurring overcharges for those services. The scope of work includes electric, gas, water, sewer, and steam/chilled water.
- 2) The firm responding to this RFP shall have an office staff with the employees necessary to support city schools requirement that is within 100 miles of the City of Pittsburgh.

- 3) The firm responding to this RFP understands that it will in no way participate or be involved in providing energy procurement brokerage services
  
- 4) The firm responding to this RFP shall provide an all-inclusive price that will include unlimited access to its information via an energy management software program as well as creation of any special reporting that the city schools may need from time to time which will include the following:
  - Provide analysis of past and current billings for accuracy and possible errors
  - Receive utility bills directly from the vendors and provide amount approved for payment within three (3) days receipt of said bills
  - Track receipt of all monthly invoices and obtain copies of any missing bills
  - Return original bills to School District with approved GL coded payment worksheets within three (3) business days of receipt
  - Contact utility companies to correct any misapplied payments
  - Notify School District when a bill is received showing usage or cost outside of set parameters
  - Assist in scheduling final reads when properties are sold
  - Contact utility companies to request the removal of all late fees
  - Monitor accounts for power factor penalties and provide monthly report of charges
  - Verify tax exemption status is correct on each bill received. Work with utility companies to correct status if found to bill incorrectly
  
- 5) The firm responding to this RFP shall provide an all-inclusive price that will include unlimited access to its information via an energy management software program as well as creation of any special reporting that the city schools may need from time to time. The online Energy Management System tool will need to provide the following capabilities
  - Access to all School District utility bills electronically.
  - Track variations through historical analysis.
  - Track usage through trend analysis.
  - Ability to provide weather adjusted cost avoidance reports.
  - Analyze different cost per square foot scenarios
  - Analyze cost per KWH and MCF per billing location.
  - Assist District personnel with on-line Energy Star Portfolio Manager Reporting  
  - Provide monthly and quarterly usages cost reports for all utility accounts servicing leased spaces
  - Monitor deduct meter accounts and request annual credits
  - Verify meter accuracy in terms of meter multipliers, numbers, and locations as needed.
  - Perform a complete utility rate schedule analysis to determine if current utility rates are correct or if other utility rate schedules would be more cost effective
  - Review all existing contracts with current utility providers for accuracy and commitment to applicable billings
  - Review all PUC utility filings and inform the District of new rates or programs that may be available to the Board

- Assist in the evaluation of proposals and information submitted to the District by utility providers
- Provide training to online Energy Management Systems as it pertains to the School District and also provide personnel to meet for review of utility information at School District offices or at firms' local office upon request

### **Timetable/Response Submittal**

Selection of the firm will be made based on the proposals submitted and possibly oral interviews, if needed. A tentative timetable for the selection of the utility invoice auditor is provided below:

- **Monday, July 17, 2017** Release of RFP
- **Monday, August 7, 2017** Receipt of Proposals
- **Thursday, August 10, 2017** Tentative Interview Date (if necessary)
- **Wednesday August 23, 2017** Selection of Utility Invoice Auditor

**Upon the release of this RFP and during the conclusion of the selection process, there shall be no communication between any prospective respondents and/or their lobbyist, authorized/unauthorized agent(s) with any staff of the School District, or any elected or appointed official of the School District and/or their staff, except as provided for in the RFP. Any violation of this provision by any prospective firm and/or its agent shall be immediate grounds for disqualification.**

### **Specific Response Requirements**

Responses should address the following questions or requests for information and be organized so that the specific questions or requests for information each begin on a new page with the question repeated at the top of the page.

#### **I. Letter of Transmittal**

Each proposal should be accompanied by a letter of transmittal which summarizes key points of the proposal and which is signed by an officer of the firm who is responsible for committing the firm's resources. Please indicate the location of your firm's offices in the Commonwealth of Pennsylvania.

#### **II. Service Team**

Provide brief resumes for the following individuals who will be assigned to the School District's utility auditing, including any relevant experience for each individual. Please include only those individuals who will work on the School District's account.

### **III. Firm Experience**

Describe the firm's relevant utility invoice auditing experience for the past 2 years, including the following categories:

**A.** All Pennsylvania school districts

**B.** All State and local governments

Please include the names and contact information for at least three references from the above two categories.

### **IV. Plan of Work**

Please provide a very detailed plan of work describing how your firm would accomplish the work requested in the scope of work.

### **V. Pricing Strategy**

Please detail the cost proposal for the engagement. The cost proposal should include at least one option which is a flat monthly fee.

### **VI. Firm Information/Equal Employment Opportunity**

- A. Describe your firm's equal employment opportunity policies and programs.
- B. Has your firm or any of its employees, or anyone acting on its behalf, ever been convicted of any crime or offense arising directly or indirectly from the conduct of your firm's business or have any of your firm's officers, directors or persons exercising substantial policy discretion ever been convicted of any crime or offense involving financial misconduct or fraud? If so, please describe any such convictions and surrounding circumstances in detail.
- C. Has your firm, or any of its employees, or anyone acting on its behalf, been indicted or otherwise charged in connection with any criminal matter arising directly or indirectly from the conduct of your firm's business which is still pending or have any of your firm's officers, directors or persons exercising substantial policy discretion been indicted or otherwise charged in connection with any criminal matter involving financial misconduct or fraud which is still pending? If so, please describe any such indictments and surrounding circumstances in detail.
- D. Please describe (i) any material financial relationships that your firm or any firm employee has with any utility companies, financial advisory firms, investment banks or law firms or other persons or entities that may create a conflict of interest in acting as a utility invoice auditor to the School District; (ii) any family relationship that any employee of your firm has with any public servant that may create a conflict of interest, or the appearance of a conflict of interest in acting as a consultant to the School District and (iii) any other matter that your firm believes may create a conflict of interest or the appearance of a conflict of interest in acting as a consultant to the School District. Please describe any procedures your firm either has adopted, or would adopt, to assure the School District that a conflict of interest would not exist for your firm in the future.

## VII. Evaluation Criteria and Selection Process

The contract(s) will be awarded to the qualified proposer(s) whose proposal is most advantageous to the School District, based upon the evaluation criteria specified below. Thus, while the points in the evaluation criteria indicate their relative importance, the total scores will not necessarily be determinative of award. Rather, the total scores will guide the School District in making an intelligent award decision based upon the evaluation criteria.

The School District reserves the right to request oral presentations from those firms determined to be in a competitive range and shall use the information derived from these oral presentations, if any, in its evaluation.

The School District anticipates selecting one utility invoice auditor. Firms will be evaluated using the following criteria to determine those which best meet the needs of the School District.

<b>Utility Invoice Auditor</b>	<b>Points</b>
A. Ability to Meet the Needs of the School District	50
B. Experience and Qualifications	20
C. Plan of Work	15
D. Pricing Strategy/Fee	15